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**SERVICE DELIVERY   
AGREEMENT**

**(NEC PROFESSIONAL SERVICES CONTRACT)**

This is a Service Delivery Agreement as defined in the Framework Agreement made between Scape Procure Limited (1) and Perfect Circle JV Ltd (2) dated 29th January 2021 (the ‘Agreement’). Except where the context otherwise requires, all terms defined in the Framework Agreement shall have the same meaning in this Service Delivery Agreement.

THIS AGREEMENT is made on

|  |  |  |  |
| --- | --- | --- | --- |
| BETWEEN  1. the *Client* |  |  |  |
| Defence Infrastructure Organisation | 2. the  *Consultant* | Perfect Circle JV Ltd |
|  |  |  |

of whose registered office is

|  |  |  |  |
| --- | --- | --- | --- |
| Address for communications | DIO Commercial Enabling Services, Defence Organisation Head Office, Lichfield, Staffordshire, WS14 9PY | Address for communications | Halford House  Charles Street  Leicester  LE1 1HA |
|  |  |  |

Telephone **REDACTED**

**REDACTED**

Telephone

|  |  |  |
| --- | --- | --- |
| Address for electronic  communications | Address for electronic  **REDACTED** ukcommunications |  |
| **REDACTED** |

|  |  |
| --- | --- |
| FOR THE SERVICES OF | Quantity Surveying & Technical Decarbonisation Advice |

Commission Name Commission No.

|  |  |  |
| --- | --- | --- |
| Client-Side Technical Advisor Net Zero 24-25 |  | 6132 |

| 1 | SCAPE Consultancy framework Service Delivery Agreement Rev 3 25-02-2021

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|  |
| --- |
| **Introduction**  NEC Professional Services Contract – Option A or C  This Model Delivery Agreement incorporates the NEC 4th edition Professional Services Contract June 2017 (the N**EC Professional Services Contract**) with January 2019 and October 2020 Amendments.  Any subsequent amendments to the NEC Professional Services Contract shall apply to this Model Delivery Agreement, if agreed in writing by Scape and the Partner, but shall only be incorporated into Delivery Agreements executed after such amendments are published and their inclusion has been agreed accordingly with SCAPE.  The following rules apply to the incorporation of clauses into a Delivery Agreement:   1. The contract clauses are varied by the incorporation of option clauses, or a Z clause. 2. The Client has sole discretion to the choice of Contract Option and Secondary options as noted above   **Whereas:**  This Delivery Agreement is made pursuant to the Framework Agreement dated 29th January 2021 made between Scape Procure Limited and the Consultant (the ‘Framework Agreement’) and incorporates those provisions of the Model Delivery Agreement set out in the Framework Agreement.  When using this Delivery Agreement, the Partner (as stated in the Framework Agreement) is the party named as ‘consultant’.  **IT IS AGREED** as follows:   1. **The *Consultant’s* Obligations**   The Consultant provides the services and complies with his obligations, acting as the Consultant in accordance with the conditions of contract set out in the Contract Data herein.   1. **The *Client’s* Obligations**   The Client pays the amount of money and complies with its obligations in accordance with the conditions. |

| 2 | SCAPE Consultancy Framework Service Delivery Agreement Rev 4 01-04-2021

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**The *Consultant’s* Offer and *Client’s* Acceptance**

The *Consultant* offers to Provide the Services in accordance with the *conditions of contract* for an amount to be determined in accordance with the *conditions of contract*.

|  |  |  |
| --- | --- | --- |
| **The offered total of the Prices is** | **£** 149,929.72 | *Leave blank if time charges are to be applied* |

**Contract Data and Service Information**

**Information provided by the Parties**

The following details the Contract Data and associated Scope / Service information which is provided by the parties for this Delivery Agreement and Appended for execution.

**The Main Contract Data must be completed in full and uploaded using ONLY the standard template provided by Scape’.**

|  |  |
| --- | --- |
| **Main Contract Data:**  General Project Information,  Clauses Applicable to Main Options and Secondary options where applicable,  Data Pertaining to Optional (X) Clauses,  Y Clauses and Z Clauses where applicable.  Contract Data Provided by the Client:  Contract Data Provided by the Consultant: |  |
|  |
|  |

**Additional Contract Data provided by the parties.**

One or more files may be attached in each section of the table below.

Please itemise and upload in the order you wish documents to be appended.

**Ref Item Description Attach**

001



**Continues**

Service Request Proposal



| 3 | SCAPE Consultancy Framework Service Delivery Agreement Rev 4 01-04-2021

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**Contract Data and Service Information**

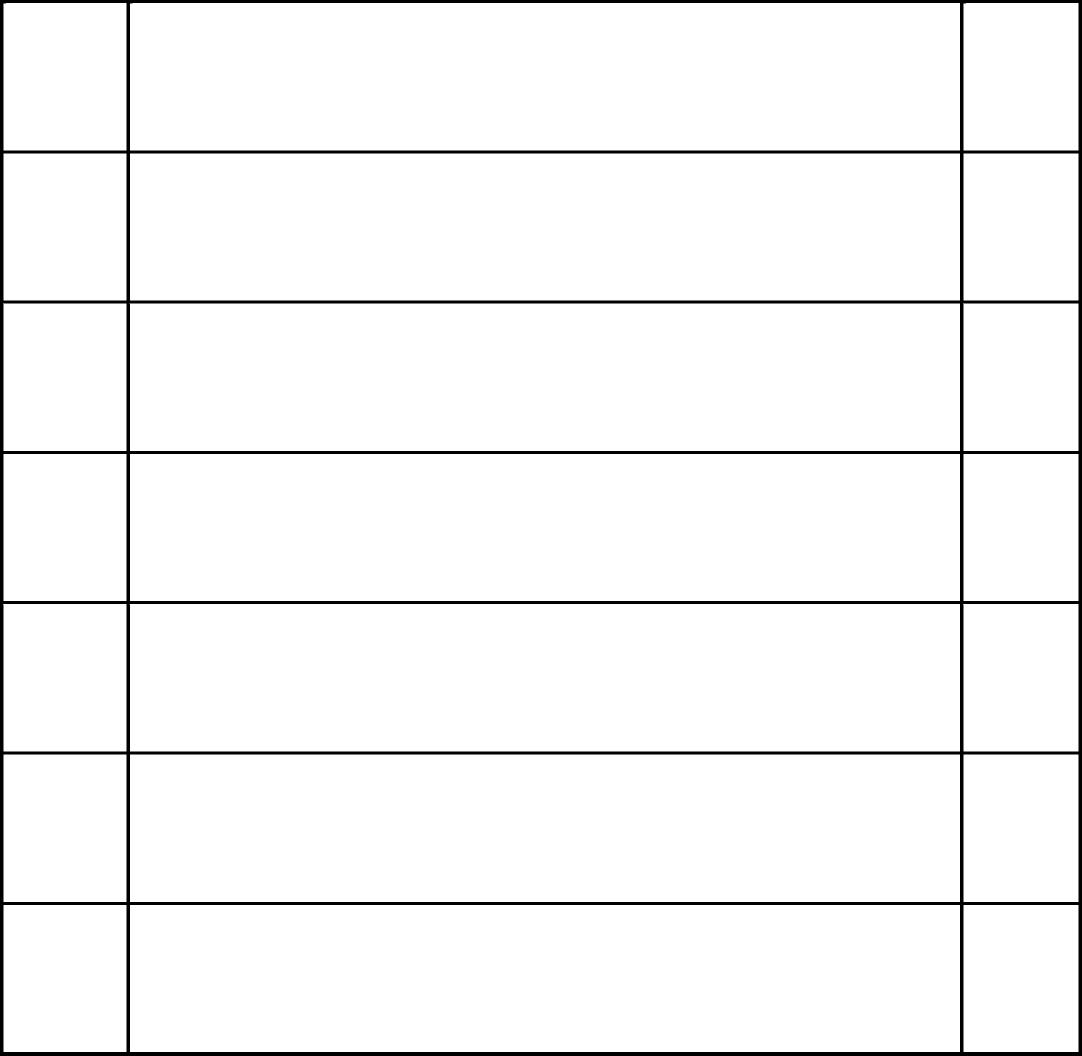


**Additional Contract Data provided by the parties.**

One or more files may be attached in each section of the table below.

Please itemise and upload in the order you wish documents to be appended.

**Ref Item Description Attach**



| 4 | SCAPE Consultancy Framework Service Delivery Agreement Rev 4 01-04-2021

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[*The execution details for the Client below are an example intended for use with DocuSign and may be amended by the Client to suit their normal practice, if required. If the Client chooses to sign the Agreement on paper, only this page should be returned by upload using the DocuSign Print and Sign function*]

Executed as a simple contact (under hand) for and on behalf of )

Defence InfrastructureLliOrganisation )

by )

Authorised Signatory **REDACTED**

Full name

Senior Commercial Officer

Position/title

Executed as a simple contract (under hand) for and on behalf of )

**Perfect Circle JV Ltd** )

by )

OR Authorised Signatory

Executed as a simple contract (under hand) by **REDACTED** as attorney for

**Perfect Circle JV Ltd** Full name

under a power of attorney

dated Director

Position/title

X

25/4/2024

| 5 | SCAPE Consultancy Framework Service Delivery Agreement Rev 4 01-04-2021

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|  | Service Delivery Agreement  NEC Professional Services Contract – Option A  **Appendix 1** |

**Contract Data: Part One – Data provided by the *Client***

**1. General**

The *conditions of contract* are the core clauses and the clauses for the following main Option, the Option for resolving and avoiding disputes and secondary Options of the NEC4 Professional Services Contract June 2017 with January 2019 and October 2020 amendments.

|  |  |  |  |
| --- | --- | --- | --- |
| Main Option | **A** | Option for resolving and avoiding disputes | W2 |

Secondary Options ‘[ ]’ may apply

The *service* is

The *Client* is

**X1**, X2, X9, X11, X18, Y(UK)2, Y(UK)3 &   
Z

**Quantity Surveying & Technical Decarbonisation Advice**

|  |
| --- |
| **Defence Infrastructure Organisation** |
| **DIO Commercial Enabling Services**  **Defence Organisation Head Office**  **Lichfield**  **Staffordshire**  **WS14 9PY** |
| **REDACTED** |
| **REDACTED** |

|  |
| --- |
| **REDACTED** |
| **DIO Commercial Enabling Services Defence Organisation Head Office Lichfield**  **Staffordshire**  **WS14 9PY** |
| **REDACTED** |
| **REDACTED** |

**The Service Request Form annexed to this contract**

Name

Address for communications

Telephone

Address for electronic communications

The *Service Manager* 1is

Name

Address for communications

Telephone

Address for electronic communications

The Scope is in

1 The Service Manager is not the Lead Partner. This is the Project Manager appointed by the Client to manage this Delivery Agreement on its behalf.

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|  | Service Delivery Agreement  NEC Professional Services Contract – Option A  **Appendix 1** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| The *language* of this contract is | | **English** | | |
| The *law* of this contract is law of | |  | | |
| **England and Wales** | | |
| The *period for reply* is |  |  | | except that |
| **2 weeks** | | |
|  The *period for reply* for | **N/A** | | is | **N/A** |
|  The *period for reply* for | **N/A** | | is | **N/A** |

|  |  |  |  |
| --- | --- | --- | --- |
| The *period for retention* is |  | **6** | years following Completion or earlier termination |
| Optional clause | 13.10 | – electronic | communication **does**  apply2. |

The following matters will be included in the Early Warning Register

 **N/A**

|  |  |
| --- | --- |
| Early warning meetings are to be held at intervals no longer than | **monthly** |

1. **The *Consultant’s* Main Responsibilities**

2 See additional conditions of contract below.

If the *Client* has identified work which is to meet a stated *condition* by a *key* date

The *key dates* and *conditions* to be met are

***condition* to be met *key date***

(1) **None**

|  |  |
| --- | --- |
| **If Option A is used** The *Consultant* prepares forecasts of the total *expenses* at intervals no longer than | **5 weeks** |

1. **Time**

|  |  |
| --- | --- |
| The *starting date* is | **26/04/2024** |

The *Client* provides access to the following persons, places and things

***access access date***

|  |  |  |  |
| --- | --- | --- | --- |
| (1) | **access to relevant areas of the building/project** |  | **26/04/2024** |

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|  | Service Delivery Agreement  NEC Professional Services Contract – Option A  **Appendix 1** |

(2) **all available record information, including statutory approvals, consents, drawings, reports and maintenance information**

The *Consultant* submits revised programmes at intervals no longer

The *completion date* for the whole of the *services* is

The period after the Contract Date within which the *Consultant* is to submit a first programme for acceptance is

**26/04/2024**

**than monthly, unless there are no changes to the latest submitted programme**

**31/03/2025**

**2 weeks**

**If the *Client* has decided the completion date for the whole of the *services***

**If no programme is identified in part two of the Contract Data**

|  |  |  |  |
| --- | --- | --- | --- |
| 1. **Quality Management** | | |  |
|  | The period after the Contract Date within which the *Consultant* is to submit a quality policy statement and quality plan programme for acceptance  The period between the Completion of the whole of the *service* and the *defects date is* | |  |
| **2 weeks** |
|  |
| **52 weeks** |
|  |
| 1. **Payment** |  | |  |
| If the *Client* states any *expenses* | The *currency* of the contract is the  The *assessment interval*  The *expenses* stated by the *Client* are  **item** | |  |
| **pound sterling** |
|  |
| **monthly** |
| **amount** |
| **None** | | **None** |
|  | % per annum (not less than 2) above the | |
| The *interest rate* is 3 |
| base | rate of the Bank of England | bank |

1. **Compensation Events**

|  |  |
| --- | --- |
| If there are  additional  compensation  events | These are the additional compensation events  **N/A** |

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|  | Service Delivery Agreement  NEC Professional Services Contract – Option A  **Appendix 1** |

**8. Liabilities and insurance**

The minimum amount of cover and the periods for which the *Consultant* maintains insurance are

|  |  |  |
| --- | --- | --- |
| **EVENT** | **MINIMUM AMOUNT OF COVER** | **PERIOD FOLLOWING COMPLETION OF THE WHOLE OF THE *SERVICES* OR EARLIER TERMINATION** |
| The *Consultant’s* failure to use the skill, care and diligence normally used by competent and appropriately qualified professionals providing services similar to the *service* | **£5,000,000**  in respect of each and every claim, or series of claims arising out of the same original cause or source, with lower annual and/or annual aggregate limits of cover in respect of claims relating to pollution, contamination and similar where such limited cover is the norm | **6 years** |
| Loss of or damage to property and liability to or death of a person (not an employee of the *Consultant*) arising from or in connection with the *Consultant* Providing the Service | **£10,000,000** on an ‘each and every claim’ basis without limit to the number of claims | **6 years** |
| Death or bodily injury to employees of the *Consultant* arising out of and in the course of their employment in connection with the contract | The greater of the amount required by the applicable law and **£10,000,000** on an ‘each and every claim’ basis without limit to the number of claims | **6 years** |

If there are additional *Client’s* liabilities

These are the additional *Client’s* liabilities

(1) **None**

**If the *Client* is to provide any of the insurance stated in the Insurance Table**

The *Client* provides the following insurances from the Insurance Table

1. **Insurance against Not applicable**

**Minimum amount of cover is The deductibles are**

1. **Insurance against**

**Minimum amount of cover is The deductibles are**

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The *Client* provides these additional insurances

1. **Insurance against** Insurance for all existing buildings and property existing

within the Site or at the sole discretion of the *Client* he may elect to ‘self-insure’ such existing buildings and property and in doing so accepts all the *Client’s* associated risks arising out of or in relation to such ‘self-insurance’. In accordance with a *Client’s* decision to ‘self-insure’ they do not accept any additional insurance premium/cost from the *Consultant.*

**If additional insurance is to be provided**

**None**

|  |  |  |
| --- | --- | --- |
| **Minimum amount of cover is The deductibles are**   1. **Insurance against**   **Minimum amount of cover is The deductibles are** |  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |  |
| The *Consultant’s* total liability to the *Client* for all matters arising under or in connection with this contract, other than the excluded matters is limited to: | | **£5,000,000.00 in the aggregate** |

Within the total liability limit identified above, the *Consultant’s* liability to the *Client* for the provision of the following low risk, low value Services arising under or in connection with this contract is limited to:

**Minimum amount of cover is The deductibles are**

1. **Insurance against Minimum amount of cover is The deductibles are**

The *Consultant* provides these additional insurances

1. **Insurance against**

**N/A at Service Request stage.**

and such other low risk, low value Services that are instructed by the Client as Compensation Events

The amount and basis of professional indemnity insurance provided by the Subconsultant(s).

**Resolving and avoiding disputes**

|  |  |
| --- | --- |
| The *tribunal* is | **the Courts of England and Wales** |

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**If Option W1 or 2** The *Senior Representatives* of the *Client* are   
**is used**

**Not named**

**N/A**

**N/A**

**N/A**

**Name & Title (1)**

**Address for communications**

**Telephone**

**Address for electronic communications**

The *Adjudicator* is

Name

Address for communication Telephone

Address for electronic communications

|  |
| --- |
| **REDACTED** |
| **Infrastructure Strategic Advice (ISA)**  **DIO S&P (Strategy & Plans)**  **IDL 412, Zone 1, Floor 2**  **Ramillies Building**  **Marlborough Lines**  **Monxton Road**  **ANDOVER**  **SP11 8HJ** |
| **REDACTED** |
| **REDACTED** |

|  |  |
| --- | --- |
| The *Adjudicator nominating body* is | **the Royal Institution of Chartered Surveyors** |

**X1 Price Adjustment for Inflation (used only with Options A and C)**

If Option X1 is used

* The *index* is the Framework index: the BCIS Labour Cost Index published by the Building Cost Information Service of the Royal Institution of Chartered Surveyors.
* The *base date* for indices is **5th January3**

**X2 Changes in the Law**

If Option X2 is The *law of the project* is the law of England and Wales   
used

**X18 Limitation of liability**

|  |  |  |
| --- | --- | --- |
| If Option X18 is used | The *Consultant’s* liability to the *Client* for indirect or consequential loss for all matters other than Cladding Claims is limited to: | **£5,000,000**  The *Consultant’s* liability to the *Client* for indirect or consequential loss or for any cost of decamping and rehousing in respect of Cladding Claim is excluded4. |

3 This is the latest anniversary of the Framework Effective Date (5th January 2021), prior to the *Contract Date*.

4 The *Consultant* is not liable to the *Client* for indirect or consequential loss or for any cost of decamping and rehousing in respect of Cladding Claims.

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|  |  |
| --- | --- |
| The *Consultant’s* liability to the *Client* for Defects that are not found until after the *defects date* is limited to | **£5,000,000** |

The *end of liability date* is **six (6)** years after Completion of the whole of the services

**Y(UK)2 Housing Grants, Construction and Regeneration Act 1996**

|  |  |  |  |
| --- | --- | --- | --- |
| If Option Y(UK)2 is used and the final date for payment is not fourteen days after the date on which payment becomes due | The period for payment is | 23 | days after the date on which payment becomes due5 |
|  |  |  |

**Y(UK)3 The Contracts (Rights of Third Parties) Act 1999**

5 Perfect Circle is required to pay its Supply Chain promptly. As a consequence, the Client is requested to pay Perfect Circle within the 21 days stated in the Delivery Agreement and not seek to amend the payment terms.

If Y(UK)3 is term *beneficiary*

used **None *None***

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**Z: The additional conditions of contract are:**

The *additional conditions of contract* are

**1. General**

11.2 (2) Insert a further bullet point:

* ‘Provided or procured all X8 Undertakings which the *Consultant* is obliged under this contract to provide or procure’

**The following clauses apply to Option A Delivery Agreements only**

11.2(16) At the end of the sentence add:   
‘less Disallowed Cost.’

11.2(18) Insert a new clause 11.2(18):   
‘Disallowed Cost is cost which;

* is included within the Commercial Inclusions Tables contained in the Pricing Procedures of the Framework Agreement,
* is not justified by the *Consultant’s* accounts and records,
* should not have been paid to the Subcontractor or supplier in accordance with its contract,
* was incurred only because the *Consultant* did not;

- follow an acceptance or procurement procedure stated in the Scope,

- give an early warning which the contract required it to give or

- give notification to the *Service Manager* of the preparation for and conduct of an adjudication or proceedings of a tribunal between the *Consultant* and a Subcontractor or supplier,

and the cost of

* activities included under the Client Proposed Appointment Charge of the Framework Agreement,
* correcting Defects after Completion,
* correcting Defects caused by the *Consultant* not complying with a constraint on how it is to Provide the Service stated in the Scope,
* resources not used to Provide the Service (after allowing for reasonable availability and utilisation), and
* preparation for and conduct of an adjudication or proceedings of the *tribunal* between the Parties.’

11.2(24) Insert a new clause 11.2(24):

“Framework Agreement’ is the framework agreement between Scape Procure Limited and the *Consultant* dated 29th January 2021. Terms defined in the Framework Agreement have the same meanings in this Contract unless a contrary intention is apparent.’

11.2(25) Insert a new clause 11.2(25):

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‘Framework Commercial Model as included in the Framework Agreement between Scape Procure Limited and the *Consultant* dated 29th January 2021.’

11.2 (26) Insert a new clause 11.2(26):

‘Data Protection Legislation means:

1. the UK GDPR (as that term is defined in the Data Protection Act 2018) and any applicable national implementing laws as amended from time to time; and
2. all applicable law about the processing of personal data and privacy.’

11.2 (27) Insert a new clause 11.2(27):

‘Data Subject has the meaning given to it in the Data Protection Legislation.’

11.2 (28) Insert a new clause 11.2(28):

‘Personal Data has the meaning given to it in the Data Protection Legislation.’

11.2 (29) Insert a new clause 11.2(29):

‘Cladding Claim shall mean any claim in respect of:

The combustibility of any Aluminium Composite Panels (and associated core/filler and insulation) which failed the BRE testing programme on behalf of The Department for Communities and Local Government in July and August 2017 or fails BS8414 test set out in the current Building Regulations.’

12.4 Insert at the end:

‘provided that Clauses 23 (Convictions), 29 (Statutory Requirements), 30 (Competition Law, Corrupt Gifts and Payments), 31 (Modern Slavery), 33 (Confidentiality and Freedom of Information), 35 (Intellectual Property) and 37.11 (Miscellaneous: Whistle Blowing) of the Framework Agreement shall be deemed incorporated into this contract, mutatis mutandis, as if references to ‘Scape’ were to ‘*the Client*’ and references to the ‘Agreement’ were to ‘the *contract*.’

12.5 Insert a new clause 12.5:

‘A reference to any statute, enactment, order, regulation or other similar instrument shall be construed as a reference to the statute, enactment, order, regulation or instrument as amended by any subsequent statute, enactment, order, regulation or instrument or as contained in any subsequent re-enactment of it.’

13.10 Insert a new clause, 13.10:

‘The following communications shall be deemed to have no effect if made by electronic mail transmission:

* Any notification of a wish to terminate this contract or the employment of the *Consultant* under it;
* Any notification by the *Consultant* of his intention to suspend performance of his obligations under this contract;
* Any invoking by either party of the procedures applicable under this contract to the resolution of disputes or differences; and
* Any agreement between the parties amending the provisions of this contract.’ *(Z clause 13.10 may be deleted at the Client’s sole discretion).*

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|  | Service Delivery Agreement  NEC Professional Services Contract – Option A  **Appendix 1** |

14.1 Add after the final sentence:

‘Notwithstanding any other provision of this contract, the terms ‘acceptance’, ‘approval’ or similar when used in the context of any acceptance or approval to be given by or on behalf of the *Service Manager* has the meaning ‘acceptance of general principles only’ and no such acceptance or approval shall diminish or relieve the *Consultant* from any of the *Consultant’s* obligations or liabilities under this contract.’

19. Insert a new Clause 19:

**Data Protection**

19.1. ‘Both Parties will comply with all applicable requirements of the Data Protection Legislation. These clauses are in addition to, and does not relieve, remove or replace, each Party’s obligations under the Data Protection Legislation. It is agreed that:

19.2. Without prejudice to the generality of clause 19.1, both Parties will ensure that it has all necessary appropriate consents and notices in place to enable lawful transfer of any Personal Data to each other for the duration and purposes of this agreement.

19.3. Without prejudice to the generality of clause 19.1, the *Consultant* shall, in relation to any Personal Data processed in connection with the performance by the *Consultant* of its obligations under this agreement:

19.3.1. Process that Personal Data only on the written instructions of the *Client* and only as required for the purpose of the performance of this agreement;

19.3.2. Ensure that it has in place appropriate technical and organisational measures, reviewed and approved by the *Client* , to protect against unauthorised or unlawful processing of Personal Data and against accidental loss or destruction of, or damage to, Personal Data, appropriate to the harm that might result from the unauthorised or unlawful processing or accidental loss, destruction or damage and the nature of the data to be protected, having regard to the state of technological development and the cost of implementing any measures (those measures may include, where appropriate, pseudonymising and encrypting Personal Data, ensuring confidentiality, integrity, availability and resilience of its systems and services, ensuring that availability of and access to Personal Data can be restored in a timely manner after an incident, and regularly assessing and evaluating the effectiveness of the technical and organisational measures adopted by it);

19.3.3. Ensure that all personnel who have access to and/or process Personal Data are obliged to keep the Personal Data confidential;

19.3.4. Not transfer any Personal Data outside of the European Economic Area;

19.3.5. Assist the *Client*, at the *Consultant’s* cost, in responding to any request from a Data Subject and in ensuring compliance with its obligations under the Data Protection Legislation with respect to security, breach notifications, impact assessments and consultations with supervisory authorities or regulators;

19.3.6. Notify the *Client* without undue delay on becoming aware of a Personal Data breach;

19.3.7. At the written direction of the *Client*, delete or return Personal Data and copies thereof to the *Client* on termination of the agreement; and

19.3.8. Maintain complete and accurate records and information to demonstrate its compliance with this clause and allow for audits by the *Client* or the *Client’s* designated auditor.

19.4. The *Client* does not consent to the *Consultant* appointing any third-party processor of Personal Data under this agreement.’

**2. The *Consultant’s* main responsibilities**

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20.2 Delete and replace with:

‘The *Consultant’s* obligation is to use (and warrant that it has used) all the reasonable skill, care and diligence normally used by competent and appropriately qualified professionals experienced in providing services similar to the *service.*’

20.6 Insert a new clause 20.6:

‘The *Consultant* checks the Scope provided by the *Client* and satisfies itself that its own provision of the *service*, including any proposals, designs and Scope or specification documents for a subsequent construction contract meet the *Client’s* Scope with no discrepancy. Where there is ambiguity, inconsistency or conflict between these documents the *Client’s* Scope will prevail.’

20.7 Insert a new clause 20.7:

‘The *Consultant* performs the Service in accordance with relevant laws and regulations, statutory and other requirements (‘Laws’) and (to the extent that the *Consultant* can control the same) such that the product of the Service complies with all relevant Laws.’

23.5 Insert a new clause 23.5:

‘The *Consultant*, in relation to any subletting of any portion of the *service*:

* Procures that the relevant subcontract contains such obligations as necessary to ensure that it is in all respects compatible with the terms of this contract and, without limitation, steps down the obligation to use the degree of skill, care and diligence specified in this contract and that requires Undertakings (collateral warranties) in favour of the *Client* to be provided in the forms specified in the Framework Agreement and with any amendments as permitted by the Framework Agreement;
* Procures that all relevant subcontracts shall be executed and delivered as a deed;
* Warrants each Subcontractor’s compliance with this contract’s Modern Slavery Act requirements;
* Warrants that all Subcontractors are fully aware of their obligations under the CDM Regulations and are fully competent and are adequately resourced to meet those obligations; and
* Provides to the *Service Manager* a certified copy of any subcontract (save for particulars of the cost of such subcontract service unless other provisions of this contract or the Framework Agreement oblige the *Consultant* to disclose them).

The *Consultant* does not appoint a subcontractor if there are compulsory grounds for excluding the subcontractor under regulation 57 of the Public Contracts Regulations 2015.’

23.6 Insert a new clause, 23.6:

‘The *Consultant* includes in any subcontract awarded by him provisions requiring that:

* payment due to the Subcontractor under the subcontract is made no later than 30 days after receipt of a valid and undisputed invoice unless the Framework Agreement required the *Consultant* to make earlier payment to the Subcontractor;
* Invoices for payment submitted by the Subcontractor are considered and verified by the *Consultant* in a timely fashion;
* Undue delay in considering and verifying invoices is not sufficient justification for falling to regard an invoice as valid and undisputed; and

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|  | Service Delivery Agreement  NEC Professional Services Contract – Option A  **Appendix 1** |

* Any contract awarded by the Subcontractor for work included in this contract includes provisions to the same effect as these provisions.’

27 Insert a new clause 27:

‘The *Consultant* shall enter a novation agreement in the form specified in the Framework Agreement with the *Client’s* contractor within 14 days of being asked to do so in writing and shall, within 14 days of being provided with an engrossment, execute and return to the *Service Manager* the *collateral warranty agreement* in favour of the *Client*, but with such amendments as the *Consultant, Client* and *Client’s* contractor may agree, such agreement not to be unreasonably withheld or delayed.’

**5. Payment**

51.6 Insert a new clause 51.6:

‘In addition to any other legal rights and remedies of the *Client*, with the exception of when the *Consultant* is novated to a contractor under the *conditions of contract*, whenever any sum of money is recoverable from or payable by the *Consultant* under this contract that sum may be deducted from any sum then due, or which at any time thereafter becomes due to the *Consultant* under this contract provided that the *Service Manager* notifies the *Consultant* in writing not later than three days before the final date for payment of the amount to be paid and the basis on which it is calculated.’

53.3 In the first line replace the word ‘contact’ with

‘contract’

**6 Compensation events**

**The following amendment applies to Option A Delivery Agreements only**

63.13 After the first sentence add:

‘Unless the *Service Manager* otherwise agrees, proposed rates must not exceed the relevant regionally adjusted *‘*People Rates with expenses’ for the applicable role and seniority stated in the relevant table of the Framework Commercial Model.’

**8 Liabilities and insurance**

83.3 delete the words ‘and care normally used by professionals’ in the first insurance of the Insurance Table and

replace with:

‘, care and diligence normally used by competent and appropriately qualified professionals experienced in’

**9 Termination**

91.9 Insert a new clause 91.9:

**The Public Contracts Regulations 2015**

‘The *Client* may terminate the *Consultant's* obligation to Provide the Service if any of the provisions of regulation 73(1) of The Public Contracts Regulations 2015 apply.

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|  | Service Delivery Agreement  NEC Professional Services Contract – Option A  **Appendix 1** |

If the *Client* terminates under the provisions of regulation 73(1)(b) of the Public Contracts Regulations 2015 as a result of information not disclosed by the *Consultant* at the Contract Date, the procedures and amounts due on termination are the same as if the *Consultant* has substantially failed to comply with his obligations (R11).

If the *Client* otherwise terminates under the provisions of regulation 73(1) of the Public Contracts Regulations 2015, the termination procedure followed is P1 and the amounts due on termination are A1 and A3.’

**X10 Information Modelling**

X10.7 (2) delete ‘and care normally used by professionals’ and add the following:

‘care and diligence normally used by competent and appropriately qualified professionals, experienced in’

**Z1.0 DEFCON Conditions**

Appendix 1 which includes DEFCON conditions shall be incorporated into this Delivery Agreement. To the extent the contents (including, but limited to the clauses, terms and conditions, obligations and liabilities) of Appendix 1 contradict any similar contents of this Delivery Agreement, then Appendix 1 shall prevail.

Please note, in Appendix 1, the “Authority” shall mean the “*Client*” and the “Contractor” shall mean the “*Consultant*” in accordance with the SCAPE Consultancy Framework terminology.

**Z2.0 Secondary Option Clause amendments**

**OPTION X1: Price adjustment for inflation**

X1.1 Defined Terms

Delete clause and replace with the following:

1. The **People Rates Prices** are those lump sum prices for each of the activities on the Activity Schedule that are derived from the People Rates (or alternative rates agreed for inclusion during the establishment of the Prices).
2. The **Price Adjustment Factor (PAF)** at each anniversary of the Framework Effective Date, 5th January 2021, is equal to (L-B)/B where L is the latest value of the Framework index and B is the value of the Framework index applicable at the *base date*.
3. The **Annual Price Adjustment Amount** is the amount for price adjustment for the upcoming year, calculated at each Framework anniversary by applying the PAF to the contracted remaining value for the People Rates Prices for the upcoming year.

X1.2 Price Adjustment Factor

Delete clause.

X1.3 Price adjustment Option A

Delete clause and replace with the following:

Only the People Rates Prices will be subject to price adjustment. The Annual Price Adjustment Amount will be apportioned as applicable throughout the year, to amounts due for the People Rates Prices.

Each amount due for services related to the People Rates Prices following a Framework anniversary includes an amount for price adjustment which is the sum of

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* the change in the Price for Services Provided to Date since the last assessment of the amount due multiplied by the PAF calculated at the latest Framework anniversary and
* the amount for price adjustment included in the previous amount due.

The *PSC fee percentage* and fixed fees paid to Subconsultants (derived from \*external rates6 - identified as External Consultancy) are not subject to price adjustment.

X1.4 Price adjustment Option C

Delete clause.

X1.5 Compensation Events

Delete clause and replace with the following;

Any quotations for compensation events notified during the upcoming year will apply the latest Framework rates and therefore the Prices for these activities will be excluded from the price adjustment calculations during that year.

X1.6 *Expenses* adjustment

Delete clause.

**Z3.0 People Rates**

**Insert new clause Z3.0: People Rates**

Z3.1 The People Rates will be adjusted annually on 5th January, in accordance with the indexation provisions

of the Framework Agreement. This is based on the BCIS Labour Cost Index. Any quotations for compensation events will apply the latest People Rates*.*

6 \*External Rates = Fixed fees established via a Client Proposed Organisation (CPO), Competitive Tender (CT), Benchmarking (BM) or a Client Preferred Supplier CPS)

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|  | Service Delivery Agreement  NEC Professional Services Contract – Option A  **Appendix 1** |

**Contract Data: Part Two – Data provided by the *Consultant***

**1. General**

The *Consultant* is   
Name

Address for communications

Telephone

Mobile

Address for electronic

communications

**Perfect Circle JV Ltd**

**Halford House, Charles Street, Leicester, LE1 1HA**

**REDACTED**

**REDACTED**

**REDACTED**

|  |  |  |
| --- | --- | --- |
| The *fee percentage* is | **4.40** | % |

The *key persons* are Name (1)

Job

Responsibilities

The Lead Partner is

**REDACTED**

**National Director**

**Job Lead**

**Pick Everard**

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1. **Payment**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **If the *Consultant* states any *expenses*** | The *expenses* stated by the *Consultant* are **(Only include expenses  and disbursements not listed in the Commercial Inclusions Table of  the Framework Agreements Pricing Procedures)**  **Item amount** | | | | | |
| **None** | |  | **None** |
|  |  |  |  |
|  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **If Option A or C is used** | The *activity schedule* is | **In the Service Request Form annexed to this contract** |
|  |  |  |
|  | The tendered total of the Prices is | **£149,929.72 + VAT** |

**A detailed breakdown of the Prices and an invoice drawdown schedule is provided in the Service Request Form annexed to this contract.**

1. **Resolving and avoiding disputes**

The *Senior Representatives* of the *Consultant* are

|  |  |  |
| --- | --- | --- |
| Lead Partner | **Pick Everard** |  |
| Address for communications | **Halford House, Charles Street, Leicester, LE1 1HA** |  |
| Telephone | **REDACTED** |  |
| Address for electronic communications | **REDACTED** |  |
|  |  |  |
| Perfect Circle JV Ltd | **Managing Director** |  |
| Address for communications | **Halford House, Charles Street, Leicester, LE1 1HA** |  |
| Telephone | **REDACTED** |  |
| Address for electronic communications | **REDACTED** |  |

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|  | Service Delivery Agreement  NEC Professional Services Contract – Option A  **Appendix 1** |

**4. Data for the Short Schedule of Cost Components (used only with Option A)**

The *people rates* are

**category of person: Hourly**

**Rate (£)**

**Project Management & Quantity Surveying**

|  |  |
| --- | --- |
| **Technical Director** | **REDACTED** |
| **Associates/Principal Consultant** | **REDACTED** |
| **Senior Consultant** | **REDACTED** |
| **Consultant** | **REDACTED** |
| **Senior Technician** | **REDACTED** |
| **Technician/Graduate** | **REDACTED** |

**Commercial Surveying**

|  |  |
| --- | --- |
| **Technical Director** | **REDACTED** |
| **Associate/Principal Consultant** | **REDACTED** |
| **Senior Consultant** | **REDACTED** |
| **Consultant** | **REDACTED** |
| **Senior Technician** | **REDACTED** |
| **Technician/Graduate** | **REDACTED** |

**Architectural Design, Mechanical Engineer,   
Electrical Engineer, Structural Engineer &   
Building Surveying**

|  |  |
| --- | --- |
| **Technical Director** | **REDACTED** |
| **Associate/Principal Consultant** | **REDACTED** |
| **Senior Consultant** | **REDACTED** |
| **Consultant** | **REDACTED** |
| **Senior Technician** | **REDACTED** |
| **Technician/Graduate** | **REDACTED** |

|  |  |
| --- | --- |
| The Client Proposed Appointment Charge is £ | **REDACTED** |

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|  | Service Delivery Agreement  NEC Professional Services Contract – Option A  **Appendix 1** |

**Annex 1 – Service Request Form**

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|  |  |
| --- | --- |
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|  | Service Delivery Agreement  NEC Professional Services Contract – Option A  **Appendix 1** |

**Appendix 1 – DEFCONS**

The following DEFCONS are additional conditions of contract and take precedence over any other amendments to the conditions of contract. DEFCONS not listed below shall not be considered additional contract conditions by reference in the listed DEFCONS.

**DEFCONs**

**DEFCON 76 (Edn 11/22) ‐ Contractor’s Personnel at Government Establishments (7 pages)**

**DEFCON 82 (Edn 06/21) ‐ Special Procedures for Initial Spares (7 pages)**

**DEFCON 501 (Edn 10/21) ‐ Definitions and Interpretations (3 pages)**

**DEFCON 513 (Edn 4/22) ‐ Value Added Tax (2 pages)**

**DEFCON 514 (Edn 08/15) ‐ Material Breach (1 page)**

**DEFCON 516 ( Edn 04/12) ‐ Equality (1 page)**

**DEFCON 518 (Edn 02/17) ‐ Transfer (1 page)**

**DEFCON 522 (Edn 11/21)** - **Payment and Recovery of Sums Due (1 page)**

**DEFCON 526 (Edn 08/02) ‐ Notices (2 pages)**

**DEFCON 527 (Edn 09/97) ‐ Waiver (1 page)**

**DEFCON 528 (Edn 10/23) ‐ Import and Export Licenses (5 pages)**

**DEFCON 529 (Edn 09/97) ‐ Law (English) (1 page)**

**DEFCON 531 (Edn 09/21) ‐ Disclosure of Information (3 pages)**

**DEFCON 532B (Edn 09/21) Protection of Personal Data (1 page)**

**DEFCON 532A (12/22) - Protection of Personal Data- Where Data is Not Being Processed on Behalf of the   
Authority**

**DEFCON 537 (Edn 12/21) ‐ Rights of Third Parties (1 page)**

**DEFCON 538 (Edn 06/02) ‐ Severability (1 page)**

**DEFCON 539 (Edn 01/22) ‐ Transparency (1 page)**

**DEFCON 550 (Edn 02/14) ‐ Child Labour and Employment Law (1 page)**

**DEFCON 602A (Edn 12/17) Quality Assurance (With Quality Plan) (1 page)**

**DEFCON 602B (12/06) - Quality Assurance (Without Deliverable Quality Plan)**

**DEFCON 604 (Edn 06/14)** - **Progress Reports (1 page)**

**DEFCON 608 (Edn 07/21)** - **Access and Facilities to Be Provided by the Contractor (1 page)**

**DEFCON 621B (Edn 10/04)** - **Transport (If Contractor Is Responsible for Transport) (1 page)**

**DEFCON 624 (Edn 11/13) Use of Asbestos (2 pages)**

**DEFCON 632 (11/21) - Third Party Intellectual Property – Rights and Restrictions**

**DEFCON 642 (Edn 07/21)** - **Progress Meetings (1 page)**

**DEFCON 649 (Edn 12/21)** - **Vesting (2 pages)**

**DEFCON 656A (08/16) - Termination for Convenience – Under £5M**

**DEFCON 658 (Edn 10/22)** - **Cyber (16 pages)**

**DECONS 659A (02/24) - Security Measures**

**DEFCON 660 (Edn 12/15)** - **Official-Sensitive Security Requirements (1 page)**

**DEFCON 691 (Edn 03/15) Timber and Wood Derived Products (3 pages)**

**DEFCON 703 (6/21) - Intellectual Property Rights - Vesting in the Authority**

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Service Request Proposal

Further to recent discussions, please find below a Service Request as defined in the Framework Agreement made between Scape Procure Limited and Perfect Circle JV Ltd dated 29th January 2021. This Service Request Proposal is formed of 4 parts:

Part A: Outline Service Requirements, which captures your service needs and desired approach,

Part B: Pre-Engagement Activity Checklist, identifying any activities required to enable our proposal and price to be presented,

Part C: Detailed Service Requirements, identifying your key value drivers, inc. Social Value and measures of Vf M captured within our comprehensive service delivery proposal,

Part D: Statement of Key Outputs, setting out the deliverables from the pre-engagement stage.

If you are satisfied that this Service Request represents an accurate record of our pre-engagement discussions, and you would like Perfect Circle to proceed with producing a Delivery Agreement based on this proposal, we should be grateful if you would provide your confirmation.

Perfect Circle is a company jointly owned by Pick Everard, Gleeds and AECOM. Our offer is unique in framework experience, with an unrivalled record of teams providing excellence through collaboration. We deliver with an extensive national supply chain formed of SMEs, micro businesses and larger consultancies, ensuring we provide performance managed services through local businesses. Forming an integrated team across Perfect Circle and our approved suppliers allows the broadest project scope to be offered with value for money through one simple and effective contract, providing maximum efficiencies and contributions to economic, environmental and social benefits to achieve the greatest levels of social value.

Part A - Outline Service Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| Client Name | Defence Infrastructure Organisation |  |  |
| Commission No. | 6132 | Commission Name (Title) | Client-Side Technical Advisor Net Zero 24-25 |
| Commission Description | DIO S&P is planning to deliver up to fifteen new EMPs for the | Commission Postcode | GU11 2HA |
|  | TLBs during 2024/2025. |  |  |
| Client Contact Name | Andrew Howe | Client Contact Email | **REDACTED** |
| Client Contact Position | Assistant Head Cross Port Folio - Infrastructure | Client Contact Telephone Number | **REDACTED** |
| Lead Partner - Company Name | Pick Everard | Commission Lead Contact Name | **REDACTED** |
| Commission Lead Contact Email | **REDACTED** | Commission Lead Contact Mobile | **REDACTED** |
| Main Contract Type | Option A NEC4 Professional Service Contract (PSC) (Service | Region | West Midlands |
|  | DA) – Priced contract with activity schedule |  |  |
|  |  | Lead Partner’s Service Manager (or | **REDACTED** |
|  |  | NEC3 PM) |  |
| Client estimated budget for Commission | 149,929.72 | Client anticipated end date | 31 Mar 2025 |
| £ |  |  |  |
| Client anticipated start date | 26 Apr 2024 |  |  |
| Has a Client’s draft/outline programme been appended? | No |  |  |
| Other Document Upload 1 |  |  |  |
| Other Document Upload 2 |  |  |  |
| Other Document Upload 3 |  |  |  |
| Has a Client’s Project Brief been appended? | Yes | If yes, upload document | 20240217\_SOR\_EMP\_Net\_Zero\_Surveys\_Client\_Side\_Technica |
| (56 KB) |
| If yes, please provide commentary |  |  |  |
| Has a Scheme Layout been appended? | No |  |  |

Are there Client Proposed Organisations? No

Part B - Pre-Engagement Activity Checklist

Are Pre-Engagement Matters required? No

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Part C - Detailed Service Requirements

1.1 Project Overview/Background This project is to deliver up to fifteen new EMPs for the TLBs during 2024/2025. This is for specialist SME client-side technical support to manage, review, and recommend the approval of the NZC elements of new EMPs delivered in FY 2024-2025. In addition, it includes an option for the internal completion of the work for the NZC survey, modelling, and report writing for NCZ supplements as and when required.

1.2 Objectives/Outcomes To procure the client-side technical advise to provide NZX technical scrutiny and governance to the revised EMP scope and deliver the following outputs.

|  |  |
| --- | --- |
| 2.0 Health, Welfare, Safety, Environment and Sustainability Considerations  3.0 Value for Money Statement | Provision of necessary PPE  Undertaking necessary training i.e. Asbestos  Travel by electric car.  Risk assessment carried out before each site visit  Undertaking necessary site induction. |

The client has selected the following Value Drivers that best match its organisation’s key objectives for the successful delivery of the commission. These should be referenced by the Client during any subsequent feedback to gauge whether Value for Money has been achieved.

Value for Money Driver (1) 1) Speed of appointment and delivery

Value for Money Driver (2) 3 Social value outcomes   
Value for Money Driver (3)

|  |  |
| --- | --- |
| 4.0 Project Success Criteria  5.0 Social Value | In addition to the Value Drivers identified in section 3.0 above, we also monitor the following Performance Indicators as standard for each commission:   * Time Predictability * Cost Predictability * Local Spend – Percentage of total spend within 20 miles of Client office/site * SME Engagement - Percentage of appointments with SME’s compared with total number of Supply Chain appointments * SME Spend - Percentage spend with SME’s compared with total spend with Supply Chain * Fair Payment - Payment of Supply Chain within Government Fair Payment guidelines * Client Satisfaction * Supply Chain Satisfaction   Working with VET as a commitment to the Arm Forces Covenant.  Progressing toward silver status.  Nominated charity Is Combat Stress. |

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 Yes   
targets?

|  |  |
| --- | --- |
| TOMS Outcome Yes | To augment our Social Value offering, Perfect Circle are engaging the National Data Set of TOMs (Themes, Opportunities, Measures) framework as a means of capturing and monetising the social value we create. We are therefore offering you to select up to a maximum of 5 TOMS, in addition to our business-as-usual activities cited above. Please confirm which of these measures, if any, you would like Perfect Circle to consider. For each measure you are invited to propose a target for us to achieve which should reflect:   * The nature, scale and duration of the services we will be delivering to you. * The accessibility of opportunities. For example, we could achieve higher outcomes in school visits (NT8) if a local authority is able to support the process of putting in place arrangements with individual schools through its Children’s Services teams.   The outcomes of these TOMS measures will be recorded and captured 4 weeks after the end of the Commission. |

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TOMS Measures

NT Ref (1) NT18 - Total amount (£) spent Comments (1) Unit £ SV 0.91

in LOCAL supply chain Proxy

through the contract Value

NT Ref (2) NT19 - Total amount (£) spent Comments (2) Unit £ SV 0.91

through contract with LOCAL Proxy

micro, small and medium Value enterprises (MSMEs)

NT Ref (3) NT61 - Fair Payment - Comments (3) Unit % SV 0.00

Percentage of invoices on the Proxy

contract paid within 30 days Value

NT Ref (4) Comments (4) Unit SV

Proxy Value

NT Ref (5) Comments (5) Unit SV

Proxy Value

NT Ref (6) Comments (6) Unit SV

Proxy Value

NT Ref (7) Comments (7) Unit SV

Proxy Value

NT Ref (8) Comments (8) Unit SV

Proxy Value

**6.0 Detailed Scope of Services**

Target (1) 67,468.37 SV Add £ 61,396.22



Target (2) 0.00 SV Add £ 0.00



Target (3) 0 SV Add £ 0.00



Target (4) SV Add £ 0.00



Target (5) SV Add £ 0.00



Target (6) SV Add £ 0.00



Target (7) SV Add £ 0.00



Target (8) SV Add £ 0.00



SV (£) 61,396.22

Total

6.1 Description of the Services to be - Quantity Surveying

Provided - Technical Decarbonisation Advise

6.2 Service / Price Exclusions Nothing to note. Commission is based upon clients brief with nothing extra included.

6.3 Key Stakeholders, Consultations and - DIO

Interdependencies - Low Carbon Estates

- Pick Everard

6.4 Summary of Services at Each Project Stage

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

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Prime Core - RIBA Stages (✔)**  Project  Management  Quantity Pick Everard Surveying  **Core - RIBA Stages (✔)** | **0-1\*** No  Yes | **2** No  No | **3**  No  No | **4**  No  No | **5**  No  No | **6** No  No | **7 Procurement Route** No  No SFR |
| Building | No | No | No | No | No | No | No |
| Surveying |  |  |  |  |  |  |  |
| Architectural | No | No | No | No | No | No | No |
| Design |  |  |  |  |  |  |  |
| Mechanical | No | No | No | No | No | No | No |
| Engineering |  |  |  |  |  |  |  |
| Electrical | No | No | No | No | No | No | No |
| Engineering |  |  |  |  |  |  |  |
| Structural | No | No | No | No | No | No | No |
| Engineering |  |  |  |  |  |  |  |
| Commercial | No | No | No | No | No | No | No |
| Surveying |  |  |  |  |  |  |  |

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6.5 Sub-consultant Selection and Low Carbon Estate have been appointed to work on this commission using the Scape Framework Rates. This appointment have been agreed between DIO, Pick Everard, and

*\* 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 for Perfect Circle to engage Client Proposed Organisations you are acknowledging in approving this Service Request that;

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

You are aware that the fees of the proposed organisation(s) are not in line with the Framework Agreement but nonetheless you are content that these offer value for money.

You have undertaken your own technical, commercial, and legal due diligence for the appointment of the proposed organisation(s).

The appointment of a Client Proposed Organisation(s) shall only be permitted when other Services are procured through the Partner and/or its Preferred Partner(s). Sole appointment of a Client Proposed

Organisation shall not be permitted unless otherwise agreed by Scape.

Perfect Circle’s appointment of a Client Proposed Organisation(s) will be conditional on the supplier:

Meeting our approval criteria (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 Perfect Circle that is back-to-back with the main contract with you.

Providing a Collateral Warranty to you.

If the risks associated with the appointment of any such organisation(s) are considered unacceptable then Perfect Circle may refuse to appoint that organisation.







|  |  |
| --- | --- |
|  | Non Core Services |
|  |



Technical Low Carbon Yes No No No No No No SFR

Decarbonisatio Estates

Advice Limited

0-1 2 3 4 5 6 7 Non Core

Procurement Route



Non Core

Service

Non Core Supplier

Competitive Tender Award Criteria Low Carbon Estates.

6.6 Appointment of Principal Designer We await confirmation from the Client of their appointment of the Principal Designer.

7.0 Delivery Team **REDACTED**

Delivery Team - document upload

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8.0 Delivery Programme

Our proposed delivery programme is as follows:

Would you like to upload your own Yes   
Project Programme

Project Programme - Document Upload Activity Schedule\_V1.0.xlsx (29 KB)



Project Programme - Document Upload



Project Programme Comments

|  |  |
| --- | --- |
|  | **Delivery Programme** |
|  |

*There are no records to display.*

|  |  |
| --- | --- |
| 9.0 Schedule of Deliverables | Please refer to document uploaded on Project Programme - Document Upload (1) titled 'Activity Schedule\_V1.0.xlsx'  Activities as follows:  - Generate a pick list for generation, thermal and energy storage activities that can be used in EMPs.  - Provide up to 21 hours of on-line NZC direction / guidance to either DIO or TLBs.  - Review (potential to deliver) DSTL EMPs-NZS on Porton Down and Portsdown West (ex Cost Plans)  - Manage / Desktop Review the Supplier Provision of NZC Supplements.  - UK StratCom Desktop Review 3 x EMPs - Sites TBC (UK StratCom Funding / AECOM Delivery)  - Contract Management - Pick Everard Fees |

f

10.0 Design Specifications and We will be following this practice as applicated by the RICS.   
Technical/Quality/Regulatory Standards

11.0 BIM Requirements and Document Standard Level of BIM applies (No specific BIM requirements).   
Control

|  |  |
| --- | --- |
| 12.0 Client Acceptance Criteria | Payment shall only be made following the satisfactory delivery of the required deliverables:  - On completion of 50% evidenced report of complete milestone - 50% payment will be made.  - On completion of 100% evidenced effort of complete milestone and acceptance by the authority. - 50% payment will be made.  - The supplier will provide a resource schedule which is broken down for each milestone at the outset of the contract and report progress against this at the end of each  month. This will then provide the evidence behind subsequent milestone staged invoicing. |

13.0 Risks and Opportunities None identified at this time.

14.0 Prerequisites, assumptions and Continued access to MODnet.   
constraints

15.0 Requirements for Surveys, Access to MOD data through MODnet and Defence share.

Investigations and Third-Party Historic

Data

16.1 Overview Fee

Our total fee is summarised as follows

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

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

C - Time Charges £ 143,610.84

D - Sub Total: Charges for Prime Core, Core Services and 143,610.84   
Time Charges £

E - External Consultancy Commissions £ 0.00

Total of Charges £ 143,610.84

F - PSC / PSSC Fee £ 6,318.88

Total Commission Value £ 149,929.72

G - Disbursements £ 0.00

Overall Commission Value £ 149,929.72

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This comprises of:

1. Where the commission relates to a Construction Project; Percentage charges for Prime Core services based on the estimated construction value.
2. Where the commission relates to a Construction Project; Percentage charges for Core services based on the estimated construction value.
3. Time charge fees covering Prime Core, Core and Non-core services. These are detailed in section 16.2 below.
4. Sub-total (A plus B plus C)
5. Prices secured from suppliers procured using 'external' non-frameworkrates. These are detailed in section 16.3 below.   
   Total of Charges (D plus E)
6. PSC / PSSC Fee

Total Commission Value (D plus E plus F)

1. 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 follows:

Service % Charges

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Project Manager | Quantity  Surveyor | Architect | Building  Surveyor | Electrical  Engineer | Mechanical  Engineer | Structural  Engineer | Total Fee |
| 2 | 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 |
| 3 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 4 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 5 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 6 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 7 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
|  |

Sub Total

Time Charges

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Project  Manager | Quantity  Surveyor | Architect | Building  Surveyor | Electrical  Engineer | Mechanical  Engineer | Structural  Engineer | Commercial  Surveyor | Non Core | Total Fee |
|  | 0.00 | 11,154.24 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 132,456.60 | 143,610.84 |
| 0 |  |  |  |  |  |  |  |  |  |  |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 1 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 2 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 3 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 4 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 5 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 6 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 7 |
|  | 0.00 | 11,154.24 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 132,456.60 | 143,610.84 |
| Sub |
| Total |  |  |  |  |  |  |  |  |  |  |

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Total Charges

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Project  Manager | Quantity  Surveyor | Architect | Building  Surveyor | Electrical  Engineer | Mechanical  Engineer | Structural  Engineer | Commercial  Surveyor | Non Core | Total Fee |
|  | 0.00 | 11,154.24 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 132,456.60 | 143,610.84 |
| 0 |  |  |  |  |  |  |  |  |  |  |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 1 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 2 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 3 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 4 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 5 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 6 |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 7 |
|  | 0.00 | 11,154.24 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 132,456.60 | 143,610.84 |
| Totals |

Escalators

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Project  Manager | Quantity  Surveyor | Architect | Building | Electrical | Mechanical | Structural  Engineer | Commercial  Surveyor | Non Core | Total Fee |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |  |  | 0.00 |
| Contract |  |  |  |  |  |  |  | 0.00 | 0.00 |  |
| Lead |  |  |  |  |  |  |  |  |  |  |
|  | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |  |  | 0.00 |
|  |
|  |  |  |
| Supervisor |  |  |  |  |  |  |  | 0.00 | 0.00 |  |

**Disbursements**

*There are no records to display.*

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16.2 Time Charge Schedule

The calculation of time charge fees is based on an hourly rate by grade and the number of hours allocated. As may be appropriate, in the description for each line we have provided a description as to how these two variables have been used.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Time Charges** |  |  |  |  |  |  |  |  |
| Discipline  Non-Core | Supplier  Low Carbon  Estates Limited | If Non-  Core,  please  state  Service  Technical Decarbonisa Advice | RIBA Stage  0 | Enter Task Details  Generate a pick list for generation, thermal and energy storage activities that can be used in EMPs. | Staff Grade  Director/Partner | Estimated Duration in  Hours  48.00 | Hourly  Rate (ex  VAT) £  116.19 | Total Fee £  5,577.12 |
| Non-Core | Low Carbon  Estates  Limited | Technical Decarbonisa Advice | 0 | Provide up to 21 hours of on-line NZC direction / guidance to either DIO or TLBs | Director/Partner | 24.00 | 116.19 | 2,788.56 |
| Non-Core | Low Carbon  Estates  Limited | Technical Decarbonisa Advice | 0 | Review (potential to deliver) DSTL EMPs-NZS on Porton Down and Portsdown West (ex Cost Plans) | Director/Partner | 64.00 | 116.19 | 7,436.16 |
| Non-Core | Low Carbon  Estates  Limited | Technical Decarbonisa Advice | 0 | Manage / Desktop Review the Supplier Provision of NZC Supplements | Director/Partner | 504.00 | 116.19 | 58,559.76 |
| Non-Core | Low Carbon  Estates  Limited | Technical Decarbonisa Advice | 0 | UK StratCom Desktop Review 3 x EMPs - Sites TBC (UK StratCom Funding / AECOM Delivery) | Director/Partner | 100.00 | 116.19 | 11,619.00 |
| Non-Core | Low Carbon  Estates  Limited | Technical Decarbonisa Advice | 0 | Ad-hoc Services (Require Director level day rate quotes) 50 days | Director/Partner | 400.00 | 116.19 | 46,476.00 |
| Quantity | Pick Everard |  | 0 | Overseeing Supply Fee Engagement | Director/Partner | 96.00 | 116.19 | 11,154.24 |
| Surveyor |

Where non-core services are provided by our Perfect Circle Partners and Suppliers that have been priced using the hourly rates from the Scape Framework Agreement, value for money is achieved as these rates have been the subject of a significant competitive tender process.

Use of teams from our JV and Preferred Partners, in favour of external suppliers, brings added value to projects in terms of a more efficient team engagement and briefing process, since the teams sit within the same organisations and they have experience of working together.

16.3 External Consultancy Costs

The below table provides a summary of those Suppliers who have been selected to undertake services that have been procured using 'external' non-framework rates, as referenced in section 6.4 above

|  |  |
| --- | --- |
|  | **External Consultancy** |

*There are no records to display.*

17 Delivery Agreement Professional Services Contract Model

17.0 Delivery Agreement Professional Service Contract Model. Option A NEC4 Professional Service Contract (PSC) (Service DA) – Priced contract with activity schedule

A description of the contracting options available to you can be

found in Appendix B. We are proposing that this appointment is

placed using the following:

Appendix A

Scope of Services Lot 1 Scope of Services Lot 1 (1).docx (174 KB)

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Appendix B

**NEC Professional Services Contract Options   
Introduction**

Services provided by Perfect Circle JV Limited (the Consultant) to Clients using the Consultancy Frameworkshall (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.

1. **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 workat 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.

1. **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 workis 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.

1. **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 FrameworkAgreement 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 FrameworkAgreement 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.

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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 resourci ng 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)

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**CLIENT-SIDE TECHNICAL ADVISOR FOR EMBEDDING A CONSISTANT NET ZERO   
CARBON (NZC) METHODOLOGY INTO ESTABLISHMENT MANAGEMENT PLANS -   
FINANCIAL YEAR 2024 - 2025**

**CLIENT-SIDE NZC TECHNICAL ADVISER (CSTA)   
(PURCHASE REQUISITION NUMBER 61811694 )   
STATEMENT OF REQUIREMENT (SOR)**

**Introduction**

1. DIO S&P is planning to deliver up to fifteen new EMPs for the TLBs during 2024/2025. These will be delivered through extant CCS EMP Frameworks. This SOR is for specialist SME client-side technical support to manage, review and recommend the approval of the NZC elements of new EMPs delivered in FY 24-25. In addition it includes an option for the internal completion of the work for the NZC survey, modelling and report writing for NZC supplements as and when required.

**Background**

1. For the period Apr 2021 – Mar 2024 all delivery of EMP related Net Zero Carbon Supplements has been through DIO commercially appointed suppliers (AECOM, Lambert Smith Hampton (LSH) and Arcadis) **with Low Carbon Estates (LCE) providing the client-side SME support through the SCAPE Framework (as a sub­contractor to Pick Everard / Perfect Circle JV Limited). For Financial Year 2024-25 DIO Commercial have approved a direct award to LCE.**
2. The IEESS established five Strategic Objectives. The already approved IEESS business case is mapped directly against Strategic Objective 2 - “Resilient and Efficient Sustainable Electricity” and supports the other four objectives. This directly addresses the Strategic Activity requiring the development of “Establishment Specific Decarbonisation Plans” required from ABC 21 onwards. All work on the current EMP contracts delivered by Arcadis and LSH are scheduled for completion before 01 April 2024.
3. The overarching EMP contracts allow for “additional services” to be added, of which these enhanced Net Zero Carbon studies are included. The Net Zero studies including an element for client-side technical services will be funded by DIO S&P.

**Objectives**

1. Procure the client-side technical advice to provide NZC technical scrutiny and governance to the revised EMP scope and deliver the following outputs.

**Scope**

1. The CSTA will liaise with the EMP suppliers to ensure a consistent decarbonisation methodology is adopted that is appropriate for both DIO and the TLB requirements. Approximately scope is listed below:

1

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|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Milesto ne** | **Activities** | | | | | | |
| **1.0** | ***Generate a pick list for generation, thermal and energy storage activities that can be used in EMPs.*** | | | | | | |
|  |  | | | | | | |
| **2.0** | ***Provide up to 21 hours of on-line NZC direction / guidance to either DIO or TLBs*** | | | | | | |
|  |  | | | | | | |
| **3.0** | ***Review (potential to deliver) DSTL EMPs - NZC Supplement on Porton Down and Portsdown West (excluding Cost Plans)*** | | | | | | |
|  |  | | | | | | |
| **4.0** | ***Manage / Desktop Review the Supplier Provision of NZC Supplements*** | | | | | | |
| 4.1 | LWGS | LULWORTH GUNNERY SCHOOL | | | Army | 2024 | L |
| RMAS | RMA SANDHURST | | | Army | 2024 | M |
| DACR | DEFENCE ANIMAL CENTRE | | | Army | 2024 | M |
|  | MONCHENGLADBACH GERMANY | | | Army | 2024 | H |
|  | SENNELAGER GERMANY | | | Army | 2024 | H |
| DREG | DREGHORN BARRACKS | | | Army | 2024 | M |
| LFNY | LECONFIELD | | | Army | 2024 | M |
| 4.2 | LOSI | | RAF LOSSIEMOUTH | Air | | 2024 | H |
| VALL | | RAF VALLEY, inc RAF MONA | Air | | 2024 | M |
| WADD | | RAF WADDINGTON | Air | | 2024 | H |
| MAWG | | RAF ST MAWGAN | Air | | 2024 | M |
| 4.3 | CALE | | HMS CALEDONIA | Navy | | 2024 | M |
| LYMP | | LYMPSTONE | Navy | | 2024 | M |
|  | | DEVONPORT | Navy | | 2024 | H |
|  |  | | | | | | |
|  |  | | | | | | |
| **5.0** | ***UK StratCom Desktop Review 3 x EMPs - Sites TBC (UK StratCom Funding / AECOM Delivery)*** | | | | | | |
|  |  | | | | | | |
| **6.0** | ***Ad-hoc Services (Require Director level day rate quotes) 50 days*** | | | | | | |
|  |  | | | | | | |

**Requirements (indicative and subject to reviews and individual call off under option g)**

Table 1

1. The above table 1 defines the requirements linked to the associated EMPs delivery.   
   They are to act as **an indicative** guide only. The authority will call off individual   
   milestones as and when required and none should be started without a specific request.

**Intellectual Property (IP) Rights (Known as IPR)**

1. DIO will own all IPR to all data and materials produced under this contract.

2

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9. Payment shall **only be made following satisfactory delivery** of the required   
deliverables. The Milestone Payment Plan will be based on the following:

|  |  |  |
| --- | --- | --- |
| **Milestones /  Deliverables** | **Description** | **Payment** |
| All milestones | On completion of 50% evidenced effort of complete milestone | 50% |
| All milestones | On completion of 100% evidenced effort of complete milestone and acceptance by the authority | 50% |
|  | The supplier will provide a resource schedule which is broken down for each milestone at the  outset of the contract and report progress  against this at the end of each month. This will then provide the evidence behind subsequent milestone staged invoicing.  Note: Dependent on the commercial  procurement route - Firm pricing will include SCAPE Framework (as a sub-contractor to Perfect Circle JV Limited) overheads. |  |

1. The DIO infrastructure optimisation (IO) team initiate the requisition order and will manage the CP&F entries with advice from DIO Fin Ops on VAT treatment and RAC code. Payment will be made as and when milestones in table 1 have been delivered to the required standard. EStrat UIN is D4445G. The RAC is NPB009. The VAT code is C1.1

**Contract Management Arrangements**

1. Commission is to be delivered through Perfect Circle (procured through the SCAPE Framework) using option g. The DIO Commercial support will be provided by:

**REDACTED** Commercial Officer

Defence Infrastructure Organisation

DIO Commercial Enabling Services

Defence Infrastructure Organisation Head Office | Lichfield | Staffordshire | WS14 9PY

Mobile: **REDACTED**

MODNET: **REDACTED**

**REDACTED** Senior Commercial Officer

Defence Infrastructure Organisation

Enabling Services

Room 1202-1221 Kentigern House, 65 Brown Street, Glasgow, G2 8EX

Tel: **REDACTED**

Mobile: **REDACTED**

1 All UIN, BLB , RAC and VAT codes advised by DIO Fin Ops at meeting of 20 Oct 21

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12. All suppliers will report directly to DH -Infrastructure Strategic Advice.

Jonathan Purser MRICS |Deputy Head of ISA|Strategy & Plans (S&P)|   
Defence Infrastructure Organisation |MOD Donnington

Note:

Previous VAT treatment for Suppliers that provide technical advice and project management services to deliver projects was linked to procurement2 as detailed in the Digital Plan of Work (DPOW) and the VAT treatment advice given is set out below:

|  |  |  |  |
| --- | --- | --- | --- |
| **DPOW Stage** | **Task** | **Function** | **VAT Code** |
| 0 | Strategy | Advice | C1 |
| 1 | Brief | Advice | C1 |
| 2 | Concept | Advice | C1 |
| 3 | Definition | Delivery | F1 |
| 4 | Design | Delivery | F1 |
| 5 | Build and Commission | Delivery | F1 |
| 6 | Handover and Closeout | Delivery | F1 |
| 7 | Operation & End of Life | Delivery | F1 |

2 VAT and Construction Work - A Guide for Project Managers, Date of Issue: Date for Review 20 Mar

17 (subject to no change in VAT legislation/policy in the interim) Version 1.0 Sponsor: DIO CFO:

Marcus Leek

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**Quantity Surveying**

|  |
| --- |
| **The Consultant may be appointed as part of the Client’s design team or as a Client Adviser to support Contractor-led/Design & Build solutions to fulfil Quantity Surveying duties.**  **The Consultant’s Quantity Surveying team will be under the direction of the client’s Lead Adviser. Under a construction contract the Quantity Surveyor would support or fulfil the Contract Lead role i.e. JCT Contract Administrator or NEC Project Manager.**  **As part of this role the Consultant should expect to deliver the following Quantity Surveying outcomes/actions.** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Generally** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Technical expertise:** The Quantity Surveyor will technical commercial/cost advice at each stage of a advising the  provide project | **+** | **+** | **+** |
| client, stakeholders and design team on market intelligence, historic reference costs/benchmarks, forecast trends and suitability of |
| cost budgets etc. The Quantity Surveyor may work alongside a Lead Adviser for the client cost advice with some  proposals, providing |
| and/or all of the other design disciplines by the Client or Contractor.  provided |
|  |
| **Contract Management:** provide contract management duties for commercial activities, otherwise supporting their fulfilment by others. Duties and deliverables as appropriate to the main form of contract e.g. NEC ECC Project Manager or NEC PSC Service Manager commercial duties, JCT Contract Administrator etc. Includes coordinating with other contract roles. | **+** | **+** | **+** |
| **Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate Plan of Work Strategies to deliver project success through combined skills of project stakeholders including design team, contractor(s), specialists, supply-chain etc. | **+** | **+** | **+** |
| **Attendance/engagement:** Attending meetings as required to ensure the meets the client’s commercial/cost requirements  project | **+** | **+** | **+** |
| and delivers appropriate value for money standards. |
|  |
| **Compliance:** Compliance with the statutory requirements, e.g. advising the client of its CDM obligations. | **+** | **+** | **+** |
|  |
| **Communication:** Maintaining effective communication with all stakeholders throughout the life of the  project project. | **+** | **+** | **+** |
|  |
| **Management:** Maintaining effective cost management e.g. commercial control, and modelling of risks and  procurement | **+** | **+** | **+** |
| opportunities (risk and value management modelling) monitoring to design team members, contractor(s), assessment  payments |
| of budget/contingency allowances and assessment of claims, compensation events etc. |
|  |
| **Reporting:** Monitoring/providing reports on actual cost against cost and regularly reporting to the client/PM  plan/budget | **+** | **+** | **+** |
|  |
| **BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. | **+** | **+** | **+** |
|  |
| **Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve | **+** | **+** | **+** |
| appropriate Stage Outcomes in a timely and efficient manner. |
|  |
| **Common data environment:** Supporting the and implementation of a common data environment  procurement platform. | **+** | **+** | **+** |
|  |
| **Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, | **+** | **+** | **+** |
| Sustainability, Collaboration and Best Practice. |
|  |
| **Data collection:** Collate wealth of data from to inform efficiencies on in  gathered past projects project question. | **+** | **+** | **+** |
|  |

Scape Consultancy Framework – Built Environment 1

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|  |  |  |  |
| --- | --- | --- | --- |
| **Strategic Definition & Preparation and Brief** | **D&B**  **1** | **D&B**  **2** | **Trad** |
|  |
| **Effective means to develop appreciation of client and its** e.g. Discuss/map client’s Requirements/Business Case,  **project**: | **+** | **+** | **+** |
| Strategic Brief and other core requirements, including reporting cycles/client organisation structure/roles, timescale and  project |
| any financial limits, whole life targets; assess these and advice on how to maintain effective lines of  give general proceed; |
| communication. |
|  |
| **Discharge responsibilities as allocated:** Diligently discharge roles, responsibilities complying with communication  project | **+** | **+** | **+** |
| methodology, common standards, Digital Execution/Building Information Modelling (BIM) and technology standards and strategy, |
| schedules of services and initial brief; agreeing strategy/actions to efficiently meet/deliver and objectives  project project quality |
| and success criteria (e.g. sustainability outcomes, whole life cost and  programme, quality). |
|  |
| **Contributing to development of execution** identify the various commercial actions/requirements at each stage  **project plan:** | **+** | **+** | **+** |
| including for additional research, surveys, investigations and Risk and Value Management Modelling etc proposals |
|  |
| **Communication**: use agreed communication channels for effective collaboration between  parties. | **+** | **+** | **+** |
|  |
| **Supporting development of most appropriate strategies:** Providing client/stakeholders with accurate and appropriate | **+** | **+** | **+** |
| technical advice/reports e.g. commercial advice; national and regional cost trends, effect of market conditions;  preliminary provide |
| elemental cost advice and on alternative building design and methods; consider any implications on  guidance programme; |
| initial budget estimate to test the feasibility a cost and cash flow forecast  prepare proposals; prepare preliminary plan |
|  |
| **Value management/optioneering:** Confer with the client and other including stakeholders and members of the  parties project | **+** | **+** | **+** |
| team on the options and alternative methods to meet client’s requirements having regard to the means of types of  procuring, |
| contract, timing, funding, resources, site conditions etc |
|  |
| **Test client’s brief:** Test client’s brief to explore available efficiencies with and alternative methods of  property portfolio project | **+** | **+** | **+** |
| delivery. |
|  |
| **Challenge brief:** Continual challenge of the brief to check that capital expenditure is focussed on added value. | **+** | **+** | **+** |
|  |
| **Benchmarking:** Produce initial benchmarking to test budget against data to offer cost certainty.  proposals | **+** | **+** | **+** |
|  |
| **Cost in use studies:** Early cost in use studies to support sustainability objectives to full consideration of total  provide | **+** | **+** | **+** |
| costs.  project |
|  |
| **ISO44001 Collaboration Workshop:** In addition to the collaboration review we will conduct an ISO44001 | **+** | **+** | **+** |
| collaboration workshop to ensure the adheres to accredited standards and status.  project |
|  |
| **Best Practice Workshop:** Conduct a best workshop to identify innovations and best solutions to be adopted  practice practice | **+** | **+** | **+** |
| into delivery.  project |
|  |
| **Social Value Workshop and Report:** Conduct a Social Value workshop and a report to capture social value features  produce | **+** | **+** | **+** |
| most relevant to the client and  project. |
|  |
| **Value for Money Workshop and Report:** Conduct a Value for Money workshop and a report to capture areas where  produce | **+** | **+** | **+** |
| VfM can be achieved at an early stage. |
|  |
| **Sustainability and Carbon Reduction Plan:** Review sustainability and carbon for the to ensure sustainability,  plan project | **+** | **+** | **+** |
| environmental enhancement and carbon reduction are embedded into the scheme. |
|  |

Scape Consultancy Framework – Built Environment 2

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|  |  |  |  |
| --- | --- | --- | --- |
| **Manage lessons learnt and client satisfaction** Identify lessons learnt and client satisfaction scores from  **process:** previous | **+** | **+** | **+** |
| at an early stage.  projects |
|  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Concept Design, Spatial Coordination and Technical Design** | **D&B** | **D&B** | **Trad** |
|  | **1** | **2** |  |
| **Procurement:** of client advisers including design team, technical specialists and contractor(s) where applicable,  procurement |  |  | **+** |
| including of PQQs/tender/mini competition documents, PQQ & tender (MEAT) or direct award assessments, reports  preparation |
| and recommendations. Advice to support most effective contracting model, form of contract etc, information on  providing |
| contractual responsibilities to support informed decision making. |
|  |
| **Procurement:** of client advisers including concept designers, technical specialists, and contractor(s) where  procurement | **+** | **+** |  |
| applicable, including of PQQs/tender/mini competition documents, PQQ & tender (MEAT) or direct award  preparation |
| assessments, reports and recommendations. Advice to support most effective contracting model, form of contract etc,  providing |
| information on contractual responsibilities to support informed decision making. Overseeing or undertaking any novations of client |
| design team members and overseeing **of Contractor's design team as rnrinirnri**  **procurement ....i..........** |
|  |
| **Teambuilding:** Assist onboarding of new team members including Contractor, working to establish  project |  |  | **+** |
| reporting/communication channels between and cultural alignment  parties |
|  |
| **Teambuilding:** Whenever Contractor appointed, work with Contractor, supporting onboarding of all new team members,  project | **+** | **+** |  |
| ensuring all roles, responsibilities, reporting/communication channels between appropriately allocated and cultural  parties |
| alignment |
|  |
| **Communication & collaboration**: Monitoring and maintain effective communication/information exchange/collaboration | **+** | **+** | **+** |
| between such as design data  parties |
|  |
| **Commercial management**: Prepare/monitor/update cost breakdown/whole life forecasts/contingency  plan/budget |  |  | **+** |
| for client approval. Using tools such as collaborative working, Risk and Value Management modelling to planning/programme |
| balance risk and value for money and audit trail of decisions and up to date cost/budget/cashflow & whole life  provide |
| forecasts/design  proposals |
|  |
| **Commercial management**: Prepare initial cost breakdowns/whole life forecasts/contingency  plans/budget planning/programme | **+** | **+** |  |
| **fnr rlinn+ nnnrnunl RAnni+nr nnri linrin+n Csnn+rnr+nr'c ricatnInnrrtnn+ of *rncl,* licinn +nnIc clink nc** k and Value Management |
| modelling to validate risk and value for money balance, auditing decisions/proposals and ensuring Contractor up to  provides |
| date cost/budget/cashflow & whole life forecasts/design  proposals |
|  |
| **Management of** Continually monitoring/validating costs against designs/programme ensuring co ordinated  **progress**: properly | **+** | **+** | **+** |
| and achievable. |
|  |
| **Reporting:** Provide detailed cost statement/contract sum analysis on approval/compliance with client/stakeholder  project | **+** | **+** | **+** |
| commercial/value targets/budget objectives, obtaining tender and direct award approvals as appropriate and supporting client |
| making informed decisions/approval to  proceed. |
|  |
| **Value Management/optioneering:** Working with client and stakeholders including client advisers/design team and Contractor |  |  | **+** |
| to obtain agreement to any budget variances or in consultation with the other members of the team reduce the scope of  project |
| the to come within the approved budget.  project |
|  |
| **Value Management/optioneering:** Working with client and stakeholders including client adviser, the Contractor and its design | **+** | **+** |  |
| team and to obtain agreement to any budget variances or in consultation with the other members of the team reduce the  project |
| scope of the to come within the approved budget.  project |
|  |
| **Contingency**  **planning:** | **+** | **+** | **+** |
|  |

Scape Consultancy Framework - Built Environment 3

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|  |  |  |  |
| --- | --- | --- | --- |
| corrective action and monitor its implementation |  |  |  |
|  |
| **Contract management:** Oversee the preparation/execution of contract documents including checking appropriate inclusions, exclusions, supply-chain costs, risk inclusions/contingencies, approvals, insurances etc, and the execution of contracts by the **client’s Legal advisers. Ag**ree the Tendered Total of the Prices for the agreed scheme with the Contractor, including making any adjustments necessary as instructed by the client, and prepare and submit a report on the Tendered Total to the client | **+** | **+** | **+** |
| **Coordination/validation:** Re examine, in consultation with the client and design team, the overall construction  proposals | **+** | **+** | **+** |
| **including costs and determine ability to meet client/stakeholders’ objectives/requirements. programme,** |
|  |
| **Interactive cost models:** Establish interactive cost models to timely investigation of multiple options of cost models.  provide | **+** | **+** | **+** |
|  |
| **Total cost reports:** Author total cost reports to single of responsibility to avoid oversights.  provide point | **+** | **+** | **+** |
|  |
| **Brief modifications:** Capture modifications to the brief to secure best value. | **+** | **+** | **+** |
|  |
| **MEP cost advice:** Provide MEP cost advice. Cost controlling engineering to savings.  provide project | **+** | **+** | **+** |
|  |
| **Assess evolving design:** Assess evolving design and cost against internal data to drive efficiency into design. | **+** | **+** | **+** |
|  |
| **Market testing:** Market test costs to reliable cost data that acknowledges supply chain.  provide | **+** | **+** | **+** |
|  |
| **Preliminaries book:** Produce book based on knowledge from open book contract.  preliminaries | **+** | **+** | **+** |
|  |
| **Early supply chain engagement:** Early supply chain engagement to secure best from of contractors.  price pool | **+** | **+** | **+** |
|  |
| **Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. | **+** | **+** | **+** |
|  |
| **Value for money update:** Provide client with update on VfM data through use of our VfM tool. | **+** | **+** | **+** |
|  |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction  process. | **+** | **+** | **+** |
|  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Manufacturing and Construction** | **D&B** | **D&B** | **Trad** |
|  | **1** | **2** |  |
| **Providing client/stakeholders with technical commercial advice/reports**: Support the client and design team, advising on | **+** | **+** | **+** |
| commercial aspects, suitability of Contractor/design team events/quotations, etc with  proposals/compensation programmes |
| recommendations to resolve areas of concern. |
|  |
| **Coordination between** attend meetings between  **parties**: parties | **+** | **+** | **+** |
|  |
| **Reporting:** Monitor/track monthly financial statements the anticipated total final cost including fees,  progress providing projecting | **+** | **+** | **+** |
| furniture, equipment and other direct and report to the client, including an assessment of the forecast cash flow for the  payments |
| remainder of the Supporting client and instigating corrective actions  project. |
|  |
| **Maintain effective communication between**  **parties:** | **+** | **+** | **+** |
|  |
| **Management:** Oversee/report on commercial including monitoring HSEQ compliance, costs to budget,  processes | **+** | **+** | **+** |
| variations/CEs. Monitor any over run on the contract which is not sanctioned by a formal extension of time, issued by the  period, |
| Contract Administrator. Failing which, recommend to the client the deductions of liquidated and ascertained damage for the un |
| extended  period. |
|  |
| **Change control:** Receiving, logging and costing all change with contractor.  proposals | **+** | **+** | **+** |
|  |

Scape Consultancy Framework **–** Built Environment 4

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|  |  |  |  |
| --- | --- | --- | --- |
| **Collaboration workshop:** Collaboration workshops throughout construction to a team approach to overcoming any  provide | **+** | **+** | **+** |
| issues that arise during construction. |
|  |
| **Change management system:** Input initiatives into change management system to explore solutions where joint benefits are derived but project objectives not impacted. | **+** | **+** | **+** |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. | **+** | **+** | **+** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Handover and Use** | **D&B** | **D&B** | **Trad** |
|  | **1** | **2** |  |
| **Post handover commercial management:** Prepare final account in collaboration with the Contractor. Prepare a cost analysis | **+** | **+** | **+** |
| of the final account in BCIS elemental format in conjunction with the team  project |
|  |
| **Reporting:** Prepare final account report including a statement of direct and submit to the client and Contract Lead e.g.  payments | **+** | **+** | **+** |
| NEC Project Manager or JCT Contract Administrator as appropriate. |
|  |
| **Project close out and benchmarking:** Produce benchmarking value report to future framework with  provide projects | **+** | **+** | **+** |
| valuable data. |
|  |
| **Social Value achievements:** Produce final social value report to understand impact of social value drivers that  provide | **+** | **+** | **+** |
| impact on community, environmental and economic outcomes.  positive |
|  |
| **Project aftercare:** Support aftercare tasks inc. occupancy evaluation and enhanced aftercare checks where required. post | **+** | **+** | **+** |
|  |
| **Post review:** Complete review, benefits realisation and customer listening  **project** post project process. | **+** | **+** | **+** |
|  |

Scape Consultancy Framework – Built Environment 5

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**Building Surveying**

|  |
| --- |
| **The Consultant will be responsible for all aspects of the design other than that normally carried out by mechanical and electrical engineers and structural engineers. Specialist consultants (e.g. for asbestos analysis, legionella testing) will be appointed in consultation with the Consultant’s Building Surveyor team.**  **The Consultant’s Building Surveying team may be appointed independently, as part of the Client’s design team or as a Client Adviser to support Contractor-led/Design & Build solutions.**  **Where other design contributors are appointed, the Building Surveyor may be required to act as Lead Designer and in addition to any duties listed below, will co-ordinate and integrate the work of other design contributors however employed.**  **As part of this role the Consultant should expect to deliver the following Building Surveyor outcomes/actions.** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Generally** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Leadership:** Acting as client’s **Lead Adviser** and/or **Lead Designer**, co-ordinating and integrating the work of client’s advisers,  design team members and other parties however employed. It must have and maintain communication and management review procedures to satisfy itself that all stages of the design team, Contractor and any 3rd parties’ work can be achieved within the programmed period. | **+** | **+** | **+** |
| **Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate RIBA Plan of Work Strategies to deliver project success through combined skills of project stakeholders including design team, contractor(s), specialists, supply-chain etc. | **+** | **+** | **+** |
| **Strategy Planning/Monitoring:** Working with client and stakeholders to establish appropriate RIBA Plan of Work Strategies and oversee their fulfilment of the course of the Project. For example, agreement of Strategies for Sustainability, Soft Landing/Plan for Use etc, benchmarking progress with RIBA’s Building in Quality or similar management tools. | **+** | **+** | **+** |
| **Project Management:** Effective management project e.g. programme and commercial control and procurement - monitoring payments to design team members, and preparing and maintaining the programmes of stakeholder engagement activities, design, Digital Execution/BIM etc, and timely procuring of each consultant, contractor, specialist etc. | **+** | **+** | **+** |
| **Contract Management:** fulfil contract management **(Contract Lead)** duties, as appropriate to the main form of contract with the contractor e.g. NEC ECC Project Manager, NEC PSC Service Manager, JCT Contract Administrator etc. Includes coordinating with or providing other contract roles, e.g. Supervisor etc | **+** | **+** | **+** |
| **Attendance/engagement:** activities should include convening/arranging and attending/chairing meetings as necessary to effectively deliver the client’s requirements, for example: client/stakeholder engagement, Soft Landing/Plan for Use, Design, Digital Execution/BIM, Project, Site Logistics/constraints, and others. Associated activities include taking/issuing comprehensive notes of each meeting and maintaining meetings are well facilitated and productive. | **+** | **+** | **+** |
| **BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. | **+** | **+** | **+** |
| **Design Management:** Lead and co-ordinate design work done by the design team, contractor’s design contributors, specialist 3rd party contractors, etc. Obtain quotations and other information in connection with specialist work. |  |  | **+** |
| **Design Management:** Lead and co-ordinate design work done by the client’s design team. Monitor ongoing development of | **+** | **+** |  |

Scape Consultancy Framework – Built Environment 6

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|  |  |  |  |
| --- | --- | --- | --- |
| Contractor’s Design.  Obtaining quotations and other information in connection with specialist work prior to the Contractor’s appointment. |  |  |  |
| **Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations. |  |  | **+** |
| **Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the  project team to advise the client of its statutory obligations. *The Building Surveyor will undertake the role of Principal Designer  under the CDM Regulations unless/until this is taken on by the contractor during the project development.* | **+** | **+** |  |
| **Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner. |  |  | **+** |
| **Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner unless Tasks and Processes allocated to Contractor/Contractor’s design team. | **+** | **+** |  |
| **Supervision:** Where requested, fulfil the NEC Supervisor or Clerk of Works duties, otherwise supporting their fulfilment of by others. | **+** | **+** | **+** |
| **Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other design team members including contributors for contractor design portions/ECI. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage. |  |  | **+** |
| **Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other client advisers and design disciplines provided by the Contractor. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage. | **+** | **+** |  |
| **Common data environment:** Supporting the procurement and implementation of a common data environment platform. | **+** | **+** | **+** |
| **Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice | **+** | **+** | **+** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Strategic Definition & Preparation and Brief** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Effective means to develop appreciation of client and its project**: e.g. Discuss/map client’s Requirements/Business Case, Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and any financial limits, whole-life targets; assess these and give general advice on how to proceed; establish stakeholders and lines of communication. | **+** | **+** | **+** |
| **Early Contractor Involvement:** engagement of shortlisted/potential direct award contractor(s) where required by client | **+** | **+** | **+** |
| **Due diligence:** Carry out site appraisal and obtain/investigate any reasonably accessible data and information relating to the project and relevant to the works. E.g. asbestos surveys/Health and Safety files, or ownership and any lessors and lessees of the site, any existing buildings on the site, boundary fence and other enclosures, any known easements, encroachments, underground services, rights of way, rights of support or other relevant matters | **+** | **+** | **+** |

Scape Consultancy Framework – Built Environment 7

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|  |  |  |  |
| --- | --- | --- | --- |
| **Discharge responsibilities as allocated:** Diligently discharge project roles, responsibilities complying with communication methodology, common standards, Digital Execution/Building Information Modelling (BIM) and technology standards and strategy, schedules of services/Scope and initial project brief; agreeing strategy/actions to efficiently meet/deliver project and quality objectives and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality). If **Lead Designer**, establish responsibilities and oversee team’s discharge of duties. | **+** | **+** | **+** |
| **Collaborative review:** Undertake, with other client advisers and design team members where appointed, technical appraisals  as may be necessary to determine the feasibility of the client’s design solution requirements such as BREEAM, Passivhaus, programmes, budgets etc. |  |  | **+** |
| **Collaborative review:** Undertake, with other client advisers and (contractor/contractor’s team where appointed) technical  appraisals as may be necessary to determine the feasibility of the client’s design solution requirements such as BREEAM, Passivhaus, programmes, budgets etc. | **+** | **+** |  |
| **Executing strategies /adding value:** develop strategies/project execution plan for the project’s execution and use in accordance with the client’s brief and stakeholder’s objectives; identify the various actions at each stage including proposals for additional research, surveys, investigations and Risk and Value Management Modelling, etc. For example, agree Sustainability Strategy, Maintenance & Operational Strategy, Handover Strategy etc | **+** | **+** | **+** |
| **Communication**: confirm communication channels including reporting and authorisation procedures to operate with the client, maintaining effective communication between parties. | **+** | **+** | **+** |
| **Supporting development of most appropriate strategies:** Providing client/stakeholders with accurate and appropriate technical advice/reports; consider any implications on programme; prepare initial budget estimate to test the feasibility proposals; prepare a preliminary cost plan and cash flow forecast. | **+** | **+** | **+** |
| **Value Management/Optioneering:** Confer with the client and other members of the project team on the options and alternative methods of meeting the client’s requirements having regard to the means of procuring, types of contract, timing, funding, resources, site conditions etc. | **+** | **+** | **+** |
| **ISO44001 Collaboration Workshop:** In addition to the collaboration review we will conduct an ISO44001 collaboration workshop to ensure the project adheres to accredited standards and status. | **+** | **+** | **+** |
| **Employers Information Requirements (EIRs):** Develop EIRs to give clarity on information formats. | **+** | **+** | **+** |
| **Asset Security Manager:** Built Asset Security Manager Audit to develop innovation, sustainability and growth objectives. | **+** | **+** | **+** |
| **Information Delivery Plan:** Develop Information Delivery Plan to manage the delivery of information. | **+** | **+** | **+** |
| **BIM protocol:** Develop BIM protocol to identify common practices throughout project delivery. | **+** | **+** | **+** |
| **Develop Government Soft Landings Strategy:** Early engagement and planning for the project’s Government Soft Landings Strategy to prepare for successful handover and operation. | **+** | **+** | **+** |
| **Review of legal matters:** Review legal matters to give confidence the project adheres to all legal requirements | **+** | **+** | **+** |
| **Statutory consents:** Appraise statutory consents including planning to ensure project is delivered in line with time requirements. | **+** | **+** | **+** |
| **Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project. | **+** | **+** | **+** |
| **Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage. | **+** | **+** | **+** |
| **Best Practice Workshop:** Conduct a best practice workshop to identify innovations and best practice solutions to be adopted into project delivery. | **+** | **+** | **+** |

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| **Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme. | **+** | **+** | **+** |
| **Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage. | **+** | **+** | **+** |

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| --- | --- | --- | --- |
| **Concept Design, Spatial Coordination and Technical Design** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Establishing the team/Procurement:** Leading procurement of client advisers including design team, technical specialists, and contractor(s) where applicable, including tender (MEAT) or direct award assessments including reports and recommendations. |  |  | **+** |
| **Establishing the team/Procurement:** Leading procurement of client advisers including concept designers, technical specialists, and contractor(s), including tender (MEAT) or direct award assessments, reports and recommendations. Overseeing or undertaking any novations and/or Contractor’s procurement of design contributors | **+** | **+** |  |
| **Teambuilding:** Onboard all new project team members including Contractor, confirming roles, responsibilities,  reporting/communication channels between parties and ensuring cultural alignment |  |  | **+** |
| **Teambuilding:** Whenever Contractor appointed, work with Contractor, supporting onboarding of all new project and/or design team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural alignment | **+** | **+** |  |
| **Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with particular reference any specialist works/services, working with Client and stakeholders including end-users, client advisers/design team and contractor, as appropriate to procurement route. | **+** | **+** | **+** |
| **Communication & collaboration**: Monitor and maintain effective communication/information exchange/collaboration between parties such as design data |  |  | **+** |
| **Communication & collaboration**: Support effective communication/information exchange/collaboration between parties such as overseeing transfer of design data, intellectual property, documents, and records to Contractor. | **+** | **+** |  |
| **Concept Design:** With other stakeholders including end-users, client advisers/design team members, Contractor etc develop a concept design from the outline proposals taking into account amendments requested by the client; where applicable give an indication of timetable for the project; obtain approval of the client. |  |  | **+** |
| **Concept Design:** Where Contractor appointed, work with Contractor and other stakeholders to support development of concept  design from the outline proposals taking into account amendments requested by the client.  Where no Contractor appointed, as client led activities. | **+** | **+** |  |
| **Commercial management**: Analyse the client’s requirements, ensure design meets client’s whole-life requirements. Oversee preparation/monitor/updates to cost plan/budget breakdown/whole-life forecasts/contingency planning/programme for client approval. Maintain Risk and Value Management modelling to balance risk and value for money and provide audit trail of decisions and up-to-date cost/budget/cashflow & whole-life forecasts/design proposals. |  |  | **+** |
| **Commercial management**: Analyse the client’s requirements, ensure Contractor’s design meets client’s whole-life requirements Oversee/monitor Contractor’s preparation/updates to cost plan/budget breakdown/whole-life forecasts/contingency planning/programme for client approval. Using Risk and Value Management modelling to validate risk and value for money balance and auditing decisions and ensuring Contractor’s cost/budget/cashflow & whole-life forecasts reflect latest design proposals. | **+** | **+** |  |
| **Due diligence:** consult with appropriate statutory bodies, specialists etc such as BREEAM Assessor, Fire Officer, Highways, Planner etc – ensuring proposals meet requirements, approvals from Building Regulations, DQI, AEDET etc. |  |  | **+** |

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| **Due diligence:** consult with appropriate statutory bodies, specialists etc such as BREEAM Assessor, Fire Officer, Highways, Planner etc – ensuring proposals meet requirements, approvals from Building Regulations, DQI, AEDET etc. Once appointed ensure Contractor maintains ongoing due diligence requirements | **+** | **+** |  |
| **Management of progress**: Continually validating designs/programme ensuring properly co-ordinated and integrated. | **+** | **+** | **+** |
| **Reporting:** Prepare progress reports and final report to client, including fully developed brief, explanation of scheme, outline  specification, estimate of cost of the building works and project plan and risks; highlighting project’s compliance with  client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed  decisions/approval to proceed. |  |  | **+** |
| **Reporting:** Prepare progress reports and final report to client, ensuring Contractor includes fully developed brief, explanation of scheme, outline specification, estimate of cost of the building works and project plan and risks. Support client by confirming project’s compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed. | **+** | **+** |  |
| **Spatial Coordination/Technical Design:** With other client advisers/design team members including contractor’s design contributors where appointed, develop spatial coordination proposals, design and technical information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship. |  |  | **+** |
| **Spatial Coordination:** With other client advisers/design team members and Contractor (where appointed), develop spatial coordination concept design and information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship as appropriate to required appointment stage.  If already appointed, oversee Contractor’s development of spatial coordination proposals into technical design/production information. | **+** | **+** |  |
| **Package coordination:** Co-ordinate design work, from design team, contractor’s Design contributors, specialist 3rd parties; obtain quotations and other information in connection with the electrical installations. Negotiate with the public and other utility authorities for provision of all necessary incoming services. |  |  | **+** |
| **Package coordination:** Monitor coordination of any design work. | **+** | **+** |  |
| **Specialist procurement:** Where specialists are to be tendered separately obtain list of tenderers from the client or assist in the preparation of a tender list, invite tenders from approved contractors; appraise and report on tenders received. If necessary, contribute to negotiation of reductions in tenders, in consultation with the client, Lead Adviser, and/or Contract Lead e.g. NEC Project Manager or JCT Contract Administrator. | **+** | **+** | **+** |
| **Procurement:** Monitor Contractor’s procurement of packages, reviewing decisions on shortlisting, MEAT etc to ensure value for money optimised. | **+** | **+** |  |
| **Strategy planning/Monitoring:** Prepare, review and update Plan of Work Strategies, e.g. Construction, Sustainability Strategy, Maintenance and Operational Strategy and review Handover Strategy and Risk Assessments. Review and update Project Execution Plan. Consider and develop Construction Strategy, including off-site fabrication, component supply and availability and Health and Safety Strategy. Issue Final Project Brief. Use market testing/early contractor involvement and collaborative working to support development of most appropriate strategies |  |  | **+** |
| **Strategy planning/Monitoring:** Prepare, initial Plan of Work Strategies, e.g. Construction, Sustainability Strategy, Maintenance and Operational Strategy and review Handover Strategy and Risk Assessments. Work with Contractor to review and update Project Execution Plan and updates to strategies. Consider Contractor’s proposals for off-site fabrication, component supply and availability and Health and Safety Strategy; issuing Final Project Brief. Use market testing/early contractor involvement and collaborative working to support development of most appropriate strategies | **+** | **+** |  |

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| **Client approval:** Complete detailed cost statement/contract sum analysis on project approval/compliance with client/stakeholder commercial/value targets/budget objectives, obtaining tender or direct award approvals as appropriate and supporting client making informed decisions/approval to proceed. Obtain the client’s approval of the type of construction, quality of materials and standard of workmanship; liaise with the project team for any design work done by 3rd party specialist contractors and suppliers and obtain quotations and other information in connection with specialist work. |  |  | **+** |
| **Client approval:** Complete detailed cost statement/contract sum analysis on project approval/compliance with client/stakeholder commercial/value targets/budget objectives, obtaining tender or direct award approvals as appropriate and supporting client making informed decisions/approval to proceed. Support the client in the review/approval of the contractor’s proposals for type of construction, quality of materials and standard of workmanship; liaise with the project team for any design work done by 3rd party specialist contractors and suppliers and obtain quotations and other information in connection with specialist work. | **+** | **+** |  |
| **Value Management/Optioneering:** Working with client and stakeholders to obtain agreement to any budget variances or in consultation with the other members of the project team reduce the scope of the project to come within the approved budget. | **+** | **+** | **+** |
| **Contingency planning:** to mitigate any impact of parties’ failure to agree to proceed. Includes determining/agreeing suitable corrective action and monitor its implementation | **+** | **+** | **+** |
| **Contract management:** Oversee the preparation/execution of contract documents including checking appropriate inclusions,  approvals, insurances etc, and their execution by the client’s Legal advisers. Check all contract documents properly executed  before work begins on site. Instigate corrective action where necessary | **+** | **+** | **+** |
| **Coordination/validation:** Re-examine, in consultation with the client and design team, the overall construction proposals including programme, costs and determine ability to meet client/stakeholders’ objectives/requirements. | **+** | **+** | **+** |
| **Review life cycle model:** Review life cycle model and benchmark against client’s asset management plan. | **+** | **+** | **+** |
| **Planning application:** Support submission of the planning application. | **+** | **+** | **+** |
| **Benefits review:** Undertake benefits review to ensure project progress against intended benefits and to identify time and resource needed. | **+** | **+** | **+** |
| **Statutory consents:** Interact with statutory bodies to ensure design meets requirements and the project is being delivered in line with time requirements. | **+** | **+** | **+** |
| **3D drawings:** Produce 3D drawings for awareness of design, interfaces and clashes. | **+** | **+** | **+** |
| **Legal constraints:** Implement design to meet legal constraints to ensure project is delivered in line with legal requirements. | **+** | **+** | **+** |
| **Scape Engage Portal:** Tender opportunity advertised on our bespoke Engage Portal Dynamic Purchasing System. | **+** | **+** | **+** |
| **Maintenance and Operational (O&M) Strategy:** Development of O&M strategy, handover strategy, testing and commissioning. | **+** | **+** | **+** |
| **Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. | **+** | **+** | **+** |
| **Value for money update:** Provide client with update on VfM data through use of our VfM tool. | **+** | **+** | **+** |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. | **+** | **+** | **+** |

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| **Manufacturing and Construction** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Leadership:** Lead/support the project tracking actions against roles/responsibilities including management and administration of construction contracts and coordination of 3rd party providers and stakeholders. |  |  | **+** |

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| --- | --- | --- | --- |
| **Leadership:** Lead/support the client’s advisers/design team tracking Contractor’s actions against roles/responsibilities including management and administration of construction contracts and coordination of 3rd party providers and stakeholders. | **+** | **+** |  |
| **Attendance:** Visit the works at appropriate intervals and inspect the progress and quality of the workmanship and materials for compliance with the contract documents and good building practice – fulfilling the role of NEC Supervisor or JCT Clerk of Works or supporting the fulfilment of this role when undertaken by others. | **+** | **+** | **+** |
| **Monitoring:** Regularly review and update Project Execution Plan including Risk Register, Quality Plan, Health and Safety & Environmental Strategies | **+** | **+** | **+** |
| **Providing client/stakeholders with technical advice/reports**: Support the client, advising of its statutory (HSEQ)  responsibilities, suitability of Contractor/design team proposals, programmes etc with recommendations to resolve areas of concern. | **+** | **+** | **+** |
| **Coordination between parties**: arrange meetings/dialogue and monitor timely provision of client/stakeholder information and approvals | **+** | **+** | **+** |
| **Reporting:** Monitor/track progress providing appropriate reporting and risk/opportunity management, using early warnings etc. Supporting client and instigating corrective actions | **+** | **+** | **+** |
| **Maintain effective communication channels between parties:** | **+** | **+** | **+** |
| **Management:** Oversee/report on commercial processes including monitoring HSEQ compliance, costs to budget, variations/CEs | **+** | **+** | **+** |
| **Submit approval to the Client Information Manager (CIM):** Authorise outputs and submit for approval to the CIM to ensure client is informed on costs. | **+** | **+** | **+** |
| **End-user engagement:** Engagement of end-users to allow a smooth transition at handover. | **+** | **+** | **+** |
| **Government Soft Landings:** Finalise end user training, occupation and aftercare programme in line with Government Soft Landings strategy for successful handover. | **+** | **+** | **+** |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. | **+** | **+** | **+** |

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| **Handover and Use** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Handover control:** Oversee handover and commissioning processes, including preparation of client/end-users, a Handover Report for the client’s approval, provision of training/O&Ms, CAFM/COBie, ‘as built’, H&S File etc. Arrange and attend handover meeting with the project team and client, capturing lessons learned etc. | **+** | **+** | **+** |
| **Post-handover management:** Monitored contractor’s aftercare/corrective work during the defects liability period, actions by end- users/3rd parties including Oversee handover and aftercare activities including defects corrections, issue of certificates, manuals, POE surveys, as-built drawings/CAFM/COBie data etc as per Project Execution Plan | **+** | **+** | **+** |
| **Post-handover commercial management:** Prepare final account in collaboration with the Contractor. Prepare a cost analysis of the final account in BCIS elemental format in conjunction with the project team | **+** | **+** | **+** |
| **Effective closure of project:** Oversight of commercial settlements, storage of certificates, manuals, as-builts, CAFM updates etc | **+** | **+** | **+** |
| **Verify project outcomes:** Verify project outcomes against client drivers to ensure positive community, environmental and economic outcomes. | **+** | **+** | **+** |
| **Benchmark report:** Prepare benchmark report to provide future framework projects with valuable data. | **+** | **+** | **+** |
| **Digital Asset Plan:** Produce a Digital Asset Plan to provide accurate budget projections. | **+** | **+** | **+** |

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| **Support enhanced aftercare tasks:** Engagement with FM team, client team and end users to ensure optimal asset performance and support enhanced building health check after 12 and 24 months. | **+** | **+** | **+** |
| **Complete post project review:** Complete post project review, benefits realisation and customer listening process. | **+** | **+** | **+** |

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**Architectural Design**

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| **The Consultant may be appointed as a member of Client’s design team or as a Client Adviser to support Contractor Led/Design & Build solutions. The Consultant will be responsible for the architectural design of elements and sub-elements of the project excluding Mechanical, Electrical and/or the Structural Engineering.**  **The Consultant’s Architectural Design Team may be required to act as the Lead Designer and in addition to any duties listed below, will co­ordinate and integrate the work of other client advisers and design team members however employed.**  **As part of this role the Consultant should expect to deliver the following Architectural Design outcomes/actions.** |

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| **Generally** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Leadership:** Acting as client’s **Lead Adviser** and/or **Lead Designer**, co-ordinating and integrating the work of client’s advisers,  design team members and other parties however employed. It must have and maintain communication and management review procedures to satisfy itself that all stages of the design team, Contractor and any 3rd parties’ work can be achieved within the programmed period. | **+** | **+** | **+** |
| **Representation:** Provide and maintain effective representation of the wider client’s design team in all formal communications with the client. Communication protocols and procedures must therefore reflect a 360° collaborative strategy and capability. |  |  | **+** |
| **Representation:** Provide and maintain effective representation of the client’s design team in all formal communications with the client until the Contractor and its design team are appointed. Once appointed the Architect will ensure the client’s requirements are reflected in the Contractor’s proposals. Communication protocols and procedures must therefore reflect a 360° collaborative strategy and capability. | **+** | **+** |  |
| **Attendance/engagement:** activities should include convening/arranging and attending/chairing meetings as necessary to effectively deliver the client’s requirements, for example: client/stakeholder engagement, Soft Landing/Plan for Use, Design, Digital Execution/BIM, Project, Site Logistics/constraints, and others. Associated activities include taking/issuing comprehensive notes of each meeting and maintaining meetings are well facilitated and productive. | **+** | **+** | **+** |
| **Strategy Planning/Monitoring:** Working with client and stakeholders including Contractor to establish appropriate Plan of Work Strategies and oversee their fulfilment of the course of the Project. For example, agreement of Strategies for achieving Sustainability Outcomes, Soft Landing/Plan for Use etc, benchmarking progress with RIBA’s Building in Quality or similar management tools. | **+** | **+** | **+** |
| **Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate Plan of Work Strategies to deliver project success through combined skills of project stakeholders including design team, contractor’s design contributors, specialists, supply-chain etc. | **+** | **+** | **+** |
| **Contract Management:** where requested provide contract management **(Contract Lead)** duties, otherwise supporting their fulfilment by others, as appropriate to the main form of contract e.g. NEC ECC Project Manager or NEC PSC Service Manager commercial duties, JCT Contract Administrator etc. Includes coordinating with other contract roles. | **+** | **+** | **+** |
| **BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. | **+** | **+** | **+** |
| **Design Management:** Lead and co-ordinate design work done by the client’s advisers/design team, contractor’s design contributors, specialist 3rd party contractors, etc. Obtain quotations and other information in connection with specialist work. |  |  | **+** |

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| **Design Management:** Lead and co-ordinate design work done by the client’s advisers/design team. Monitor ongoing  development of Contractor’s Design.  Obtaining quotations and other information in connection with specialist work prior to the Contractor’s appointment. | **+** | **+** |  |
| **Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations. |  |  | **+** |
| **Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations. *The Architect will undertake the role of Principal Designer under the CDM Regulations unless/until this is taken on by the contractor during the project development.* | **+** | **+** |  |
| **Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner. |  |  | **+** |
| **Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner unless Tasks and Processes allocated to Contractor/Contractor’s design team. | **+** | **+** |  |
| **Supervision:** Where requested fulfil the NEC Supervisor or Clerk of Works duties, otherwise supporting their fulfilment of by others. | **+** | **+** | **+** |
| **Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other design team members including contributors for contractor design portions/ECI. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage. |  |  | **+** |
| **Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other client advisers and design disciplines provided by the Contractor. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage. | **+** | **+** |  |
| **Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice. | **+** | **+** | **+** |
| **Sustainability and Carbon Reduction Plan:** Scope and plan sustainability and carbon delivery to ensure sustainability, environmental enhancement and carbon reduction are embedded into project delivery. | **+** | **+** | **+** |

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| **Strategic Definition & Preparation and Brief** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Effective means to develop appreciation of client and its project**: e.g. Discuss/map client’s Requirements/Business Case, Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and any financial limits, whole-life targets; assess these and give general advice on how to proceed; establish stakeholders and lines of communication. | **+** | **+** | **+** |
| **Due diligence:** Carry out site appraisal and obtain information on ownership and any lessors and lessees of the site, any existing buildings on the site, boundary fence and other enclosures, any known easements, encroachments, underground services, rights of way, rights of support or other relevant matters | **+** | **+** | **+** |
| **Establishing clear responsibilities of each party:** Establishing project roles, responsibilities, communication methodology, common standards, Digital Execution Plan/Building Information Modelling (BIM) and technology standards and strategy, | **+** | **+** | **+** |

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| schedules of services and initial project brief; agreeing project and quality objectives and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality). |  |  |  |
| **Executing strategies/adding value:** develop strategy/project execution plan for the project’s execution and use in accordance with the client’s brief and stakeholder’s objectives; identify the various actions at each stage including proposals for additional research, surveys, investigations and Risk and Value Management Modelling, etc. For example, agree Sustainability Strategy, Maintenance & Operational Strategy, Handover Strategy etc | **+** | **+** | **+** |
| **Value management/Optioneering:** Confer with the client and other members of the project team on the options and alternative methods of meeting the client’s requirements having regard to the means of procuring, types of contract, timing, funding, resources, site conditions etc | **+** | **+** | **+** |
| **Collaborative review:** Undertake, with other appointed client advisers/design team members/Contractor Design Contributors  etc, technical appraisals as may be necessary to determine the feasibility of the client’s design requirements such as BREEAM, Passivhaus, programmes, budgets etc |  |  | **+** |
| **Collaborative review:** Undertake, with other client advisers/design team members and (contractor/contractor’s team where  appointed) technical appraisals as may be necessary to determine the feasibility of the client’s design requirements such as BREEAM, Passivhaus, programmes, budgets etc | **+** | **+** |  |
| **Communication**: confirm communication channels including reporting and authorisation procedures to operate with the client, maintaining effective communication between parties. | **+** | **+** | **+** |
| **Government Soft Landings:** Develop Soft Landings Strategy – early engagement and preparation for successful handover and operation. | **+** | **+** | **+** |
| **ISO44001 Collaboration Workshop:** In addition to the collaboration review we will build in an ISO44001 collaboration workshop to ensure the project adhered to accredited standards and status. | **+** | **+** | **+** |
| **Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project. | **+** | **+** | **+** |
| **Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage. | **+** | **+** | **+** |
| **Best Practice Workshop:** Conduct a best practice workshop to identify innovations and best practice solutions to be adopted into project delivery. | **+** | **+** | **+** |
| **Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme. | **+** | **+** | **+** |
| **Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage. | **+** | **+** | **+** |

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| --- | --- | --- | --- |
| **Concept Design, Spatial Coordination and Technical Design** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Establishing the team/Procurement:** Leading procurement design team/client advisers, specialists, contractor(s), including tender (MEAT) or direct award assessments, reports/recommendations and drawings and documents as required. Supporting team with identification of long lead/pre-ordered items or activities. |  |  | **+** |
| **Establishing the team/Procurement:** Leading procurement design team/client advisors, specialists, contractor(s), including tender (MEAT) or direct award assessments, reports/recommendations and drawings and documents as required. Overseeing any novations and/or Contractor’s procurement of design contributors. Supporting team with identification of long lead/pre- | **+** | **+** |  |

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| ordered items or activities. |  |  |  |
| **Clarify brief:** working with identified Stakeholders including client advisers, design team, Contractor, end-users etc to analyse and constructively challenge brief, establish room data sheets, whole-life performance/operational requirements etc | **+** | **+** | **+** |
| **Teambuilding:** Onboard all new project team members including the Contractor, confirming roles, responsibilities,  reporting/communication channels between parties and ensuring cultural alignment |  |  | **+** |
| **Teambuilding:** Whenever Contractor appointed, work with the Contractor, supporting onboarding of all new project team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural alignment | **+** | **+** |  |
| **Communication & collaboration**: Monitoring and maintain effective communication/information exchange/collaboration  between parties such as design data to support development of concept design |  |  | **+** |
| **Communication & collaboration**: support effective communication/information exchange/collaboration between parties  reviewing data/proposals for compatibility, ensuring parties benefit from specialist expertise, facilitating review workshops, peer reviews, etc | **+** | **+** |  |
| **Concept Design:** With other stakeholders including end-users, project team members etc develop a concept design from the outline proposals taking into account amendments requested by the client; where applicable give an indication of timetable for the project; obtain approval of the client. |  |  | **+** |
| **Concept Design:** Where Contractor appointed, work with Contractor and other stakeholders to support development of concept  design from the outline proposals taking into account amendments requested by the client.  Where no Contractor appointed, as client led/Traditional activities. | **+** | **+** |  |
| **Commercial management**: Analyse the client’s requirements, ensure design meets client’s whole-life requirements Oversee preparation/monitor/updates to cost plan/budget breakdown/whole-life forecasts/contingency planning/programme for client approval. Maintain Risk and Value Management modelling to balance risk and value for money and provide audit trail of decisions and up-to-date cost/budget/cashflow & whole-life forecasts/design proposals |  |  | **+** |
| **Commercial management**: Analyse the client’s requirements, ensure Contractor’s design meets client’s whole-life requirements  Oversee/monitor Contractor’s preparation/updates to cost plan/budget breakdown/whole-life forecasts/contingency  planning/programme for client approval. Using Risk and Value Management modelling to validate risk and value for money balance and auditing decisions and ensuring the Contractor’s cost/budget/cashflow & whole-life forecasts reflect latest design proposals | **+** | **+** |  |
| **Due diligence:** consult with appropriate statutory bodies, specialists etc such as BREEAM Assessor, Fire Officer, Highways, Planner etc – ensuring proposals meet requirements, approvals from Building Regulations, DQI, AEDET etc. |  |  | **+** |
| **Due diligence:** consult with appropriate statutory bodies, specialists etc such as BREEAM Assessor, Fire Officer, Highways, Planner etc – ensuring proposals meet requirements, approvals from Building Regulations, DQI, AEDET etc. Once appointed ensure Contractor maintains ongoing due diligence requirements | **+** | **+** |  |
| **Management of progress**: Continually validating designs/programme ensuring properly co-ordinated and integrated. | **+** | **+** | **+** |
| **Reporting:** Prepare progress reports and final report to client, including fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks; highlighting project’s compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed. |  |  | **+** |
| **Reporting:** Prepare progress reports and final report to client, ensuring Contractor includes fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks. Support client by confirming project’s compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and | **+** | **+** |  |

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| supporting client making informed decisions/approval to proceed. |  |  |  |
| **Spatial Coordination/Technical Design:** With other client advisers/design team members including contractor’s design contributors where appointed, develop spatial coordination proposals, design and technical information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship. |  |  | **+** |
| **Spatial Coordination:** With other client advisers/design team members and Contractor (where appointed), develop spatial coordination concept design and information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship as appropriate to required appointment stage.  If already appointed, oversee Contractor’s development of spatial coordination proposals into technical design/production information. | **+** | **+** |  |
| **Package coordination:** Co-ordinate design work, from design team, contractor’s Design contributors, specialist 3rd parties; obtain quotations and other information in connection with the electrical installations. Negotiate with the public and other utility authorities for provision of all necessary incoming services. |  |  | **+** |
| **Package coordination:** Monitor coordination of any design work. | **+** | **+** |  |
| **Specialist procurement:** Where specialists are to be tendered separately obtain list of tenderers from the client or assist in the preparation of a tender list, invite tenders from approved contractors; appraise and report on tenders received. If necessary, contribute to negotiation of reductions in tenders, in consultation with the client, Lead Adviser, and/or Contract Lead e.g. NEC Project Manager or JCT Contract Administrator. | **+** | **+** | **+** |
| **Procurement:** Monitor Contractor’s procurement of packages, reviewing decisions on shortlisting, MEAT etc to ensure value for money optimised. | **+** | **+** |  |
| **Strategy planning/Monitoring:** Prepare, review and update Plan of Work Strategies, e.g. Construction, Sustainability Strategy, Maintenance and Operational Strategy and review Handover Strategy and Risk Assessments. Review and update Project Execution Plan. Consider and develop Construction Strategy, including off-site fabrication, component supply and availability and Health and Safety Strategy. Issue Final Project Brief. Use market testing/early contractor involvement and collaborative working to support development of most appropriate strategies |  |  | **+** |
| **Strategy planning/Monitoring:** Prepare, initial Plan of Work Strategies, e.g. Construction, Sustainability Strategy, Maintenance and Operational Strategy and review Handover Strategy and Risk Assessments. Work with Contractor to review and update Project Execution Plan and updates to strategies. Consider the Contractor’s proposals for off-site fabrication, component supply and availability and Health and Safety Strategy; issuing Final Project Brief. Use market testing/early contractor involvement and collaborative working to support development of most appropriate strategies | **+** | **+** |  |
| **Client approval:** Complete detailed cost statement/contract sum analysis on project approval/compliance with client/stakeholder commercial/value targets/budget objectives, obtaining tender or direct award approvals as appropriate and supporting client making informed decisions/approval to proceed. Obtain the client’s approval of the type of construction, quality of materials and standard of workmanship; liaise with the project team for any design work done by 3rd party specialist contractors and suppliers and obtain quotations and other information in connection with specialist work. |  |  | **+** |
| **Client approval:** Complete detailed cost statement/contract sum analysis on project approval/compliance with client/stakeholder commercial/value targets/budget objectives, obtaining tender or direct award approvals as appropriate and supporting client making informed decisions/approval to proceed. Support the client in the review/approval of the contractor’s proposals for type of construction, quality of materials and standard of workmanship; liaise with the project team for any design work done by 3rd party specialist contractors and suppliers and obtain quotations and other information in connection with specialist work. | **+** | **+** |  |
| **Value Management/Optioneering:** Working with client and stakeholders to obtain agreement to any budget variances or in consultation with the other members of the project team reduce the scope of the project to come within the approved budget. | **+** | **+** | **+** |

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| **Contingency planning:** to mitigate any impact of parties’ failure to agree to proceed. Includes determining/agreeing suitable corrective action and monitor its implementation | **+** | **+** | **+** |
| **Contract management:** Oversee the preparation/execution of contract documents including checking appropriate inclusions,  approvals, insurances etc, and their execution by the client’s Legal advisers. Check all contract documents properly executed  before work begins on site. Instigate corrective action where necessary | **+** | **+** | **+** |
| **Coordination/validation:** Re-examine, in consultation with the client and design team, the overall construction proposals including programme, costs and determine ability to meet client/stakeholders’ objectives/requirements. | **+** | **+** | **+** |
| **Design development:** Develop design using BIM to inform the client with progress on budget, time and quality. | **+** | **+** | **+** |
| **Statutory approvals:** Statutory approvals strategy to ensure timely approvals. | **+** | **+** | **+** |
| **Operation and Maintenance (O&M) Strategy:** Development of O&M strategy, handover strategy, testing and commissioning. | **+** | **+** | **+** |
| **Scape Engage Portal:** Tender opportunity advertised on our bespoke Engage Portal Dynamic Purchasing System. | **+** | **+** | **+** |
| **Virtual Construction Model:** Produce Virtual Construction Model to reduce design risks. | **+** | **+** | **+** |
| **Benefits review:** Review of progress against intended benefits considers time, tools and resource needed. | **+** | **+** | **+** |
| **Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. | **+** | **+** | **+** |
| **Value for money update:** Provide client with update on VfM data through use of our VfM tool. | **+** | **+** | **+** |
| **Engagement with end-user community:** Engage with end-user community to enable users to be key influencers in design development. | **+** | **+** | **+** |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. | **+** | **+** | **+** |

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| **Manufacturing and Construction** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Leadership:** Lead/support the project team tracking actions against roles/responsibilities including management and  administration of construction contracts and coordination of 3rd party providers and stakeholders. |  |  | **+** |
| **Leadership:** Lead/support the client’s advisers/design team tracking Contractor’s actions against roles/responsibilities including management and administration of construction contracts and coordination of 3rd party providers and stakeholders. | **+** | **+** |  |
| **Attendance:** Visit the works at appropriate intervals and inspect the progress and quality of the workmanship and materials for compliance with the contract documents and good building practice– fulfilling the role of NEC Supervisor or JCT Clerk of Works or supporting the fulfilment of this role when undertaken by others. | **+** | **+** | **+** |
| **Monitoring:** Regularly review and update Project Execution Plan including Risk Register, Quality Plan, Health and Safety & Environmental Strategies | **+** | **+** | **+** |
| **Providing client/stakeholders with technical advice/reports**: Support the client, advising of its statutory (HSEQ)  responsibilities, suitability of Contractor/design team proposals, programmes etc with recommendations to resolve areas of concern. | **+** | **+** | **+** |
| **Coordination between parties**: arrange meetings/dialogue and monitor timely provision of client/stakeholder information and approvals | **+** | **+** | **+** |

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| **Reporting:** Monitor/track progress providing appropriate reporting and risk/opportunity management, using early warnings etc. Supporting client and instigating corrective actions | **+** | **+** | **+** |
| **Maintain effective communication channels between parties:** | **+** | **+** | **+** |
| **Management:** Oversee/report on commercial processes including monitoring HSEQ compliance, costs to budget, variations/CEs | **+** | **+** | **+** |
| **Government Soft Landings:** Finalise end user training, occupation and aftercare programme in line with Soft Landings strategy for successful handover. | **+** | **+** | **+** |
| **Asset Information Model:** Check completeness of Asset Information Model to secure best outcomes for the client. | **+** | **+** | **+** |
| **Defects:** Proactive defects management. | **+** | **+** | **+** |
| **End-user engagement:** End-user engagement to allow a smooth transition at handover. | **+** | **+** | **+** |
| **Media engagement:** Media engagement to foster goodwill in the community and celebrate success. | **+** | **+** | **+** |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. | **+** | **+** | **+** |

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| **Handover and Use** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Handover control:** Oversee handover and commissioning processes, including preparation of client/end-users, a Handover Report for the client’s approval, provision of training/O&Ms, CAFM/COBie, ‘as built’, H&S File etc. Arrange and attend handover meeting with the project team and client, capturing lessons learned etc. | **+** | **+** | **+** |
| **Post-handover management:** Monitored contractor’s aftercare/corrective work during the defects liability period, actions by end- users/3rd parties including Oversee handover and aftercare activities including defects corrections, issue of certificates, manuals, POE surveys, as-built drawings/CAFM/COBie data etc as per Project Execution Plan | **+** | **+** | **+** |
| **Effective closure of project:** Oversight of storage of certificates, manuals, as-builts, CAFM updates etc | **+** | **+** | **+** |
| **Asset Information Model:** Handover of Asset Information Model to ensure client receives data and information to support operation of the facility. | **+** | **+** | **+** |
| **Verify project outcomes:** Verify project outcomes against client drivers to ensure positive community, environmental and economic outcomes. | **+** | **+** | **+** |
| **Benchmark report:** Prepare benchmark report to provide future framework projects with valuable data. | **+** | **+** | **+** |
| **Support enhanced aftercare tasks:** Engagement with FM team, client team and end users to ensure optimal asset performance and support enhanced building health check after 12 and 24 months. | **+** | **+** | **+** |
| **Complete post project review:** Complete post project review, benefits realisation and customer listening process. | **+** | **+** | **+** |

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**Mechanical Engineering**

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| **The Consultant will be responsible for all aspects of Mechanical Engineering.**  **The Consultant’s Mechanical Engineering team may be appointed independently, as part of the Client’s design team or as a Client Adviser to support Contractor-led/Design & Build solutions. The Lead Designer will co-ordinate and integrate Mechanical Engineering activities with the work of other design contributors however employed.**  **For projects where the services content forms the majority or all of the work relate to Mechanical Engineering the Consultant’s Mechanical Engineering Team may be required to act as the Lead Designer and co-ordinate and integrate the work of other design contributors however employed.**  **As part of this role the Consultant should expect to deliver the following Mechanical Engineering outcomes/actions.** |

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| **Generally** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Attendance/engagement:** activities should include convening/arranging and attending/chairing meetings as necessary to effectively deliver the client’s requirements, for example: client/stakeholder engagement, Soft Landing/Plan for Use, Design, BIM/Digital Execution, Project, Site Logistics/constraints, and others. Associated activities include taking/issuing comprehensive notes of each meeting and maintaining meetings are well facilitated and productive. | **+** | **+** | **+** |
| **Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate Plan of Work Strategies to deliver project success through combined skills of project stakeholders including design team, contractor(s), specialists, supply-chain etc. | **+** | **+** | **+** |
| **Contract Management:** where requested provide contract management **(Contract Lead)** duties, otherwise supporting their fulfilment by others, as appropriate to the main form of contract e.g. NEC ECC Supervisor, Project Manager or NEC PSC Service Manager duties, JCT Contract Administrator, Clerk of Works etc. Includes coordinating with other contract roles. | **+** | **+** | **+** |
| **BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. | **+** | **+** | **+** |
| **Design Management:** Lead and co-ordinate design or support coordination of Mechanical Engineering with design work done by the client’s design team, contractor’s design contributors, specialist 3rd party contractors, etc. Obtain quotations and other information in connection with specialist work. |  |  | **+** |
| **Design Management:** Lead and co-ordinate design or support coordination of Mechanical Engineering with design work done  by the client’s design team. Monitor ongoing development of Contractor’s Mechanical Engineering Design.  Obtaining quotations and other information in connection with specialist work prior to the Contractor’s appointment. | **+** | **+** |  |
| **Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations. | **+** | **+** | **+** |
| **Statutory compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations. | **+** | **+** | **+** |
| **Supervision:** Where requested, fulfil the NEC Supervisor or Clerk of Works duties, otherwise supporting their fulfilment of by others. | **+** | **+** | **+** |

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| **Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner. |  |  | **+** |
| **Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner unless Tasks and Processes allocated to Contractor/Contractor’s design team. | **+** | **+** |  |
| **Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other design team members including contributors for contractor design portions/ECI. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage. |  |  | **+** |
| **Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other client advisers and design disciplines provided by the Contractor. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage. | **+** | **+** |  |
| **Common data environment:** Supporting the procurement and implementation of a common data environment platform. | **+** | **+** | **+** |
| **Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice. | **+** | **+** | **+** |
| **Sustainability and Carbon Reduction Plan:** Scope and plan sustainability and carbon strategy to ensure sustainability, environmental enhancement and carbon reduction are embedded into project delivery. | **+** | **+** | **+** |

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| **Strategic Definition & Preparation and Brief** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Effective means to develop appreciation of client and its project**: e.g. Discuss client’s Requirements/Business Case, Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and any financial limits, whole-life targets, construction strategy; assess these and give general advice on how to proceed; maintain effective lines of communication. | **+** | **+** | **+** |
| **Due diligence:** Carry out site appraisal and obtain/investigate any reasonably accessible data and information relating to the project and relevant to the works. E.g. asbestos surveys/Health and Safety files, or ownership and any lessors and lessees of the site, any existing buildings and services on the site, boundary fence and other enclosures, any known easements, encroachments, underground services, rights of way, rights of support or other relevant matters | **+** | **+** | **+** |
| **Commercial input:** Work with other client advisers/design team members & contributors/contractor/specialists to provide an approximation of cost based upon unit volume, unit area or similar available statistics, cost for basic services, renewables, rain water harvesting, Biomass as appropriate to meet whole-life requirements | **+** | **+** | **+** |
| **Discharge responsibilities as allocated:** Diligently discharge project roles, responsibilities complying with communication methodology, common standards, Digital Execution/Building Information Modelling (BIM) and technology standards and strategy, schedules of services and initial project brief; agreeing strategy/actions to efficiently meet/deliver project and quality objectives and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality). | **+** | **+** | **+** |
| **Add Value:** identify the various actions at each stage including proposals for additional research, surveys, investigations and Risk and Value Management Modelling, etc. For example agree Sustainability Strategy, Maintenance & Operational Strategy, | **+** | **+** | **+** |

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| Handover Strategy etc to meet the client’s brief and stakeholders’ objectives. |  |  |  |
| **Value management/Optioneering:** Confer with the client and other parties including members of the design team, contractor etc., on the options and alternative methods of meeting the client’s requirements having regard to the means of procuring, types of contract, timing, funding, resources, site conditions etc | **+** | **+** | **+** |
| **Collaborative review:** Undertake, with other appointed client advisers/design team members/Contractor Design Contributors  etc, technical appraisals as may be necessary to determine the feasibility of the client’s mechanical engineering solution requirements such as BREEAM, Passivhaus, programmes, budgets etc |  |  | **+** |
| **Collaborative review:** Undertake, with other client advisers/design team members and (contractor/contractor’s design team  where appointed) technical appraisals as may be necessary to determine the feasibility of the client’s mechanical engineering solution requirements such as BREEAM, Passivhaus, programmes, budgets etc | **+** | **+** |  |
| **Communication**: use agreed communication channels including reporting and authorisation procedures to operate with the client, maintaining effective communication between parties. | **+** | **+** | **+** |
| **Government Soft Landings:** Develop Soft Landings Strategy – early engagement and preparation for successful handover and operation. | **+** | **+** | **+** |
| **ISO44001 Collaboration Workshop:** In addition to the collaboration review we will build in an ISO44001 collaboration workshop to ensure the project adheres to accredited standards and status. | **+** | **+** | **+** |
| **Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project. | **+** | **+** | **+** |
| **Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage. | **+** | **+** | **+** |
| **Best Practice Workshop:** Conduct a best practice workshop to identify innovations and best practice solutions to be adopted into project delivery. | **+** | **+** | **+** |
| **Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme. | **+** | **+** | **+** |
| **Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage. | **+** | **+** | **+** |

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| **Concept Design, Spatial Coordination and Technical Design** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Support establishment of the team/Procurement:** supporting lead adviser/client design team members in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered mechanical engineering items. |  |  | **+** |
| **Support establishment of the team/Procurement:** supporting lead adviser/client design team members in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered items. Assisting any novations and/or Contractor’s procurement of mechanical engineering design contributors Supporting team with identification of long lead/pre-ordered items | **+** | **+** |  |
| **Teambuilding:** Assist onboarding of new project team members including Contractor, working to establish  reporting/communication channels between parties and cultural alignment |  |  | **+** |
| **Teambuilding:** Whenever Contractor appointed, work with Contractor, supporting onboarding of all new project team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural | **+** | **+** |  |

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| alignment |  |  |  |
| **Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with the client’s advisers/design team, with particular reference to mechanical services and specialist work affecting the structure. |  |  | **+** |
| **Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with the  Contractor/Contractor’s design team, with particular reference to mechanical services and specialist work affecting the structure. | **+** | **+** |  |
| **Due diligence:** Consult any local or any other authority necessary in connection with the mechanical design of the works and prepare details and calculations as necessary to the appropriate Authorities |  |  | **+** |
| **Due diligence:** Consult any local or any other authority necessary in connection with the mechanical design of the works and prepare details and calculations as necessary to the appropriate Authorities. Once appointed ensure Contractor maintains ongoing due diligence requirements | **+** | **+** |  |
| **Communication & collaboration**: Maintain effective communication/information exchange/collaboration between parties such as design data for the engineering services showing locations and approximate sizes of plant rooms, major items of plant, ducts and service run; also approximate weights of any item affecting architectural concepts and structural design to ensure compatibility. |  |  | **+** |
| **Communication & collaboration**: Maintain effective communication/information exchange/collaboration between parties reviewing data/proposals for compatibility, ensuring parties benefit from specialist expertise, facilitating specialist workshops, peer reviews etc | **+** | **+** |  |
| **Concept Design:** With other stakeholders including end-users, design team members, Contractor Design Contributors (where appointed) etc support development of concept design and prepare calculations (such as heating and cooling loads), drawings and specification of the works within the cost plan limit. |  |  | **+** |
| **Concept Design:** Where Contractor appointed, work with Contractor and other stakeholders to support development of concept design from the outline proposals taking into account amendments requested by the client and review Contractor’s calculations (such as heating and cooling loads).  Where no Contractor appointed, as client led/Traditional activities. | **+** | **+** |  |
| **Commercial input**: In conjunction with client advisers/design team members & contributors/contractor/specialists providing advice on the cost for the mechanical design solution for the project. | **+** | **+** | **+** |
| **Technical advice/design reviews**: Continually validating designs/programme such as evaluations of energy use and  consumption calculations, advising the client’s design team on energy conservation measure and ensuring design elements properly co-ordinated and integrated. |  |  | **+** |
| **Technical advice/design reviews**: Continually validating designs/programme such as evaluations of energy use and  consumption calculations, advising the client’s on the suitability of proposed energy conservation measures and ensuring design elements properly co-ordinated and integrated. | **+** | **+** |  |
| **Reporting:** Prepare progress reports and final report to client, including fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks; highlighting project’s compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed. |  |  | **+** |
| **Reporting:** Prepare progress reports and final report to client, ensuring Contractor includes fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks. Support client by confirming project’s compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed. | **+** | **+** |  |
| **Spatial Coordination/Technical Design:** With other client advisers/design team members including contractor’s design contributors where appointed, develop spatial coordination proposals, design and technical information to enable tenders to be |  |  | **+** |

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| invited including drawings, schedules and specification of materials and standard of workmanship. Submit final designs for each of the engineering services to be included in the works with the associated estimates and assist in preparation of report for the client. |  |  |  |
| **Spatial Coordination:** With other client advisers/design team members and Contractor (where appointed), develop spatial coordination concept design and information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship as appropriate to required appointment stage.  If already appointed, oversee Contractor’s development of spatial coordination proposals into technical design/production  information. Assessing final designs for each of the engineering services to be included in the works with the associated  estimates and assist in preparation of report for the client. | **+** | **+** |  |
| **Package coordination:** Co-ordinate any mechanical engineering installation design work, from design team, contractor’s design contributors, specialist 3rd parties; obtain quotations and other information in connection with the mechanical installations. Negotiate with the public and other utility authorities for provision of all necessary incoming services. |  |  | **+** |
| **Package coordination:** Monitor coordination of any mechanical engineering installation design work. | **+** | **+** |  |
| **Specialist procurement:** Where mechanical installations are to be tendered separately obtain list of tenderers from the client or assist in the preparation of a tender list, invite tenders from approved contractors; appraise and report on tenders received. If necessary, contribute to negotiation of reductions in tenders, in consultation with the client, Lead Adviser, and/or Contract Lead e.g. NEC Project Manager or JCT Contract Administrator. |  |  | **+** |
| **Procurement:** Monitor Contractor’s procurement of mechanical engineering packages, reviewing decisions on shortlisting, MEAT etc to ensure value for money optimised. | **+** | **+** |  |
| **Assists and support approval process:** Providing timely and accurate mechanical drawings/calculations etc for Building  Regulations, responding to any queries / conditions. |  |  | **+** |
| **Assists and support approval process:** Providing timely assessments of Contractor’s mechanical drawings/calculations etc  for Building Regulations, responding to any queries / clarification requests. | **+** | **+** |  |
| **Validation:** Collaboratively re-examine proposals to determine their ability to meet client/stakeholders’ objectives/requirements. | **+** | **+** | **+** |
| **Statutory consents:** Provide support to the team in securing any statutory consents to ensure the project is delivered in line with time requirements. | **+** | **+** | **+** |
| **Operation and Maintenance (O&M) Strategy:** Development of O&M strategy, handover strategy, testing and commissioning. | **+** | **+** | **+** |
| **Scape Engage Portal:** Tender opportunity advertised on our bespoke Engage Portal Dynamic Purchasing System. | **+** | **+** | **+** |
| **Benefits review:** Review of progress against intended benefits considers time, tools and resource needed. | **+** | **+** | **+** |
| **Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. | **+** | **+** | **+** |
| **Value for money update:** Provide client with update on VfM data through use of our VfM tool. | **+** | **+** | **+** |
| **Engagement with end-user community:** Engage with end-user community to enable ‘users’ to be key influencers in design development. | **+** | **+** | **+** |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. | **+** | **+** | **+** |

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| --- | --- | --- | --- |
| **Manufacturing and Construction** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Management:** Oversee/report on mechanical engineering progress including monitoring compliance, costs to budget, | **+** | **+** | **+** |

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| variations/CEs programme reviews etc to support Lead Adviser, Lead Designer, Contract Lead and Client |  |  |  |
| **Maintain effective communication channels between parties:** | **+** | **+** | **+** |
| **Design/approval:** assist contractor/supply-chain installation drawings production/sign-off |  |  | **+** |
| **Design/approval:** approve/sign-off contractor/supply-chain installation drawings | **+** | **+** |  |
| **Commercial input:** support accurate commercial management of works with input to applications, compensation  events/variations etc | **+** | **+** | **+** |
| **Attendance:** Visit the works at appropriate intervals and inspect the progress and quality of the workmanship and materials for compliance with the contract documents and good building practice – fulfilling the role of NEC Supervisor or JCT Clerk of Works or supporting the fulfilment of this role when undertaken by others. | **+** | **+** | **+** |
| **Coordination between parties**: attending meetings/dialogue and monitor timely provision of client/stakeholder information and approvals | **+** | **+** | **+** |
| **Providing client/stakeholders with technical advice/reports**: Support the client, advising on suitability of Contractor/design team proposals, programmes etc with recommendations to resolve areas of concern. | **+** | **+** | **+** |
| **Witnessing, testing & commissioning:** to demonstrate full functionality, balancing of systems, sign-off of records, suitable training of end-users etc | **+** | **+** | **+** |
| **Reporting:** Monitor/track progress providing appropriate reporting and risk/opportunity management, using early warnings etc. Supporting client and instigating corrective actions | **+** | **+** | **+** |
| **Records:** ensuring Client, end-users, Lead Designer, and Contract Lead have as-built records and data for Health and Safety File and the Building Log Book, including an operation and maintenance manual for the mechanical services | **+** | **+** | **+** |
| **Government Soft Landings:** Finalise end user training, occupation and aftercare programme in line with Government Soft Landings strategy for successful handover. | **+** | **+** | **+** |
| **End-user engagement: End-user engagement to allow a smooth transition at handover.** | **+** | **+** | **+** |
| **Media engagement:** Media engagement to foster goodwill in the community and celebrate success. | **+** | **+** | **+** |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. | **+** | **+** | **+** |

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| --- | --- | --- | --- |
| **Handover and Close Out & In Use** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Handover control:** Provide maintenance details and operating manuals with record drawings in hard and electronic copy and submit to the Client, end-users, Lead Designer, and Contract Lead | **+** | **+** | **+** |
| **Performance management:** At handover and after the completion of making good defects, submit a report on mechanical sub- contractor’s performance to the client | **+** | **+** | **+** |
| **Commercial input:** Assist in the preparation of the final account. | **+** | **+** | **+** |
| **Effective closure of project:** Oversight of storage of certificates, manuals, as-builts, CAFM updates etc | **+** | **+** | **+** |
| **Verify project outcomes:** Verify project outcomes against client drivers to ensure positive community, environmental and economic outcomes. | **+** | **+** | **+** |
| **Benchmark report:** Prepare benchmark report to provide future framework projects with valuable data. | **+** | **+** | **+** |
| **Support enhanced aftercare tasks:** Engagement with FM team, client team and end users to ensure optimal asset performance and support enhanced building health check after 12 and 24 months. | **+** | **+** | **+** |

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| **Complete post project review:** Complete post project review, benefits realisation and customer listening process. | **+** | **+** | **+** |

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**Electrical Engineering**

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| **The Consultant will be responsible for all aspects of Electrical Engineering.**  **The Consultant’s Electrical Engineering team may be appointed independently, as part of the Client’s design team or as a Client Adviser to support Contractor-led/Design & Build solutions. The Lead Designer will co-ordinate and integrate Electrical Engineering activities with the work of other design contributors however employed.**  **For projects where the services content forms the majority or all of the work relate to Electrical Engineering the Consultant’s Electrical Engineering Team may be required to act as the Lead Designer and co-ordinate and integrate the work of other design contributors however employed.**  **As part of this role the Consultant should expect to deliver the following Electrical Engineering outcomes/actions.** |

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| --- | --- | --- | --- |
| **Generally** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Attendance/engagement:** activities should include convening/arranging and attending/chairing meetings as necessary to effectively deliver the client’s requirements, for example: client/stakeholder engagement, Soft Landing/Plan for Use, Design, BIM/Digital Execution, Project, Site Logistics/constraints, and others. Associated activities include taking/issuing comprehensive notes of each meeting and maintaining meetings are well facilitated and productive. | + | + | + |
| **Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate Plan of Work Strategies to deliver project success through combined skills of project stakeholders including design team, contractor(s), specialists, supply-chain etc. | + | + | + |
| **Contract Management:** where requested provide contract management **(Contract Lead)** duties otherwise supporting their fulfilment by others, as appropriate to the main form of contract e.g. NEC ECC Supervisor, Project Manager or NEC PSC Service Manager duties, JCT Contract Administrator, Clerk of Works etc. Includes coordinating with other contract roles. | **+** | **+** | **+** |
| **BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. | **+** | **+** | **+** |
| **Design Management:** Lead and co-ordinate design or support coordination of Electrical Engineering with design work done by the client’s design team, contractor’s design contributors, specialist 3rd party contractors, etc. Obtain quotations and other information in connection with specialist work. |  |  | **+** |
| **Design Management:** Lead and co-ordinate design or support coordination of Electrical Engineering with design work done by  the client’s design team. Monitor ongoing development of Contractor’s Electrical Engineering Design.  Obtaining quotations and other information in connection with specialist work prior to the Contractor’s appointment. | **+** | **+** |  |
| **Statutory compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations. | **+** | **+** | **+** |
| **Supervision:** Where requested to fulfil the NEC Supervisor or Clerk of Works duties, otherwise supporting their fulfilment of by others. | **+** | **+** | **+** |
| **Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations. | + | + | + |
| **Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve |  |  | + |

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| appropriate Stage Outcomes in a timely and efficient manner. |  |  |  |
| **Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner unless Tasks and Processes allocated to Contractor/Contractor’s design team. | + | + |  |
| **Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other design team members including contributors for contractor design portions/ECI. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage. |  |  | **+** |
| **Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other client advisers and design disciplines provided by the Contractor. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage. | **+** | **+** |  |
| **Common data environment:** Supporting the procurement and implementation of a common data environment platform. | **+** | **+** | **+** |
| **Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice. | **+** | **+** | **+** |
| **Sustainability and Carbon Reduction Plan:** Scope and plan sustainability and carbon strategy to ensure sustainability, environmental enhancement and carbon reduction are embedded into project delivery. | **+** | **+** | **+** |

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| **Strategic Definition & Preparation and Brief** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Effective means to develop appreciation of client and its project**: e.g. Discuss client’s Requirements/Business Case, Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and any financial limits, whole-life targets, construction strategy; assess these and give general advice on how to proceed; maintaining effective lines of communication. | **+** | **+** | **+** |
| **Due diligence:** Carry out site appraisal and obtain/investigate any reasonably accessible data and information relating to the project and relevant to the works. E.g. asbestos surveys/Health and Safety files, or ownership and any lessors and lessees of the site, any existing buildings and services on the site, boundary fence and other enclosures, any known easements, encroachments, underground services, rights of way, rights of support or other relevant matters | **+** | **+** | **+** |
| **Collaborative review:** Undertake, with other appointed client advisers/design team members/Contractor Design Contributors  etc, technical appraisals as may be necessary to determine the feasibility of the client’s electrical engineering solution requirements such as BREEAM, Passivhaus, programmes, budgets etc |  |  | **+** |
| **Collaborative review:** Undertake, with other client advisers/design team members and (contractor/contractor’s team where  appointed) technical appraisals as may be necessary to determine the feasibility of the client’s electrical engineering solution requirements such as BREEAM, Passivhaus, programmes, budgets etc | **+** | **+** |  |
| **Commercial input:** Work with other client advisers/design team members & contributors/contractor/specialists to provide an approximation of cost based upon unit volume, unit area or similar available statistics, cost for basic services, renewables e.g. wind turbine, CHP and, solar electricity (PV) to meet whole-life requirements | **+** | **+** | **+** |
| **Discharge responsibilities as allocated:** Diligently discharge project roles, responsibilities complying with communication | **+** | **+** | **+** |

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| methodology, common standards, Digital Execution/Building Information Modelling (BIM) and technology standards and strategy, schedules of services and initial project brief; agreeing strategy/actions to efficiently meet/deliver project and quality objectives and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality). |  |  |  |
| **Add Value:** identify the various actions at each stage including proposals for additional research, surveys, investigations and Risk and Value Management Modelling, etc. For example, agree Sustainability Strategy, Maintenance & Operational Strategy, Handover Strategy etc to meet the client’s brief and stakeholders’ objectives. | **+** | **+** | **+** |
| **Value management/Optioneering:** Confer with the client and other parties including members of the design team, contractor etc., on the options and alternative methods of meeting the client’s requirements having regard to the means of procuring, types of contract, timing, funding, resources, site conditions etc | **+** | **+** | **+** |
| **Communication**: use communication channels including reporting and authorisation procedures to operate with the client, maintaining effective communication between parties. | **+** | **+** | **+** |
| **Government Soft Landings:** Develop Soft Landings Strategy – early engagement and preparation for successful handover and operation. | **+** | **+** | **+** |
| **ISO44001 Collaboration Workshop:** In addition to the collaboration review we will build in an ISO44001 collaboration workshop to ensure the project adhered to accredited standards and status. | **+** | **+** | **+** |
| **Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project. | **+** | **+** | **+** |
| **Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage. | **+** | **+** | **+** |
| **Best Practice Workshop:** Conduct a best practice workshop to identify innovations and best practice solutions to be adopted into project delivery. | **+** | **+** | **+** |
| **Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme. | **+** | **+** | **+** |
| **Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage. | **+** | **+** | **+** |

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| **Concept Design, Spatial Coordination and Technical Design** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Support establishment of the team/Procurement:** supporting lead adviser/client design team member in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered electrical engineering items. |  |  | **+** |
| **Support establishment of the team/Procurement:** supporting lead adviser/client design team member in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered items. Assisting any novations and/or Contractor’s procurement of electrical engineering design contributors Supporting team with identification of long lead/pre-ordered items | **+** | **+** |  |
| **Teambuilding:** Assist onboarding of new project team members including the Contractor, working to establish  reporting/communication channels between parties and cultural alignment |  |  | **+** |
| **Teambuilding:** Whenever Contractor appointed, work with the Contractor, supporting onboarding of all new project team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural alignment | **+** | **+** |  |

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| **Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with stakeholders including the client’s advisers/design team, with particular reference to electrical services and specialist work affecting the structure. |  |  | **+** |
| **Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with stakeholders including the Contractor/Contractor’s design team, with particular reference to electrical services and specialist work affecting the structure. | **+** | **+** |  |
| **Due diligence:** Consult any local or any other authority necessary in connection with the electrical design of the works and prepare details and calculations as necessary to the appropriate Authorities |  |  | **+** |
| **Due diligence:** Consult any local or any other authority necessary in connection with the electrical design of the works and prepare details and calculations as necessary to the appropriate Authorities. Once appointed ensure the Contractor maintains ongoing due diligence requirements | **+** | **+** |  |
| **Communication & collaboration**: Maintain effective communication/information exchange/collaboration between parties such as design data for the engineering services showing locations and approximate sizes of plant rooms, major items of plant, ducts and service run; also approximate weights of any item affecting architectural concepts and structural design to ensure compatibility. |  |  | **+** |
| **Communication & collaboration**: Maintain effective communication/information exchange/collaboration between parties  reviewing data/proposals for compatibility, ensuring parties benefit from specialist expertise, facilitating specialist workshops, peer reviews etc | **+** | **+** |  |
| **Concept Design:** With other stakeholders including end-users, design team members, Contractor Design Contributors (where appointed) etc support development of concept design and prepare calculations (such as heating, cooling, power loads etc), drawings and specification of the works within the cost plan limit. |  |  | **+** |
| **Concept Design:** Where Contractor appointed, work with Contractor and other stakeholders to support development of concept design from the outline proposals taking into account amendments requested by the client and review Contractor’s calculations (such as heating, cooling power loads).  Where no Contractor appointed, as client led/Traditional activities. | **+** | **+** |  |
| **Commercial input**: In conjunction with client advisers/design team members & contributors/contractor/specialists providing advise on the cost for the electrical design solution for the project. | **+** | **+** | **+** |
| **Technical advice/design reviews**: Continually validating designs/programme such as evaluations of energy/power use and consumption calculations, advising the client’s design team on energy conservation measure and ensuring design elements properly co-ordinated and integrated. |  |  | **+** |
| **Technical advice/design reviews**: Continually validating designs/programme such as evaluations of energy/power use and consumption calculations, advising the client on the suitability of proposed energy conservation measures and ensuring design elements properly co-ordinated and integrated | **+** | **+** |  |
| **Reporting:** Prepare progress reports and final report to client, including fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks; highlighting project’s compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed. |  |  | **+** |
| **Reporting:** Prepare progress reports and final report to client, ensuring Contractor includes fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks. Support client by confirming project’s compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed. | **+** | **+** |  |
| **Spatial Coordination/Technical Design:** With other client advisers/design team members including contractor’s design |  |  | **+** |

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| contributors where appointed, develop spatial coordination proposals, design and technical information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship. Submit final designs for each of the engineering services to be included in the works with the associated estimates and assist in preparation of report for the client. |  |  |  |
| **Spatial Coordination:** With other client advisers/design team members and Contractor (where appointed), develop spatial coordination concept design and information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship as appropriate to required appointment stage.  If already appointed, oversee Contractor’s development of spatial coordination proposals into technical design/production  information. Assessing final designs for each of the engineering services to be included in the works with the associated  estimates and assist in preparation of report for the client. | **+** | **+** |  |
| **Package coordination:** Co-ordinate any electrical engineering installation design work, from design team, contractor’s Design contributors, specialist 3rd parties; obtain quotations and other information in connection with the electrical installations. Negotiate with the public and other utility authorities for provision of all necessary incoming services. |  |  | **+** |
| **Package coordination:** Monitor coordination of any electrical engineering installation design work. | **+** | **+** |  |
| **Specialist procurement:** Where electrical installations are to be tendered separately obtain list of tenderers from the client or assist in the preparation of a tender list, invite tenders from approved contractors; appraise and report on tenders received. If necessary contribute to negotiation of reductions in tenders, in consultation with the client, Lead Adviser, and/or Contract Lead e.g. NEC Project Manager or JCT Contract Administrator. | **+** | **+** | **+** |
| **Procurement:** Monitor Contractor’s procurement of electrical engineering packages, reviewing decisions on shortlisting, MEAT etc to ensure value for money optimised. | **+** | **+** |  |
| **Assists and support approval process:** Providing timely and accurate drawings/calculations etc for Building Regulations,  responding to any queries / conditions. |  |  | **+** |
| **Assists and support approval process:** Providing timely assessments of Contractor’s drawings/calculations etc for Building  Regulations, responding to any queries / clarification requests. | **+** | **+** |  |
| **Validation:** Collaboratively re-examine proposals to determine their ability to meet client/stakeholders’ objectives/requirements. | **+** | **+** | **+** |
| **Statutory consents:** Provide support to the team in securing any statutory consents to ensure the project is delivered in line with time requirements. | **+** | **+** | **+** |
| **Operation and Maintenance (O&M) Strategy:** Development of O&M strategy, handover strategy, testing and commissioning. | **+** | **+** | **+** |
| **Scape Engage Portal:** Tender opportunity advertised on our bespoke Engage Portal Dynamic Purchasing System. | **+** | **+** | **+** |
| **Benefits review:** Review of progress against intended benefits considers time, tools and resource needed. | **+** | **+** | **+** |
| **Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. | **+** | **+** | **+** |
| **Value for money update:** Provide client with update on VfM data through use of our VfM tool. | **+** | **+** | **+** |
| **Engagement with end-user community:** Engage with end-user community to enable users to be key influencers in design development. | **+** | **+** | **+** |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. | **+** | **+** | **+** |

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| --- | --- | --- | --- |
| **Manufacturing and Construction** | **D&B** | **D&B** | **Trad** |
|  | **1** | **2** |  |

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| **Management:** Oversee/report on electrical engineering progress including monitoring compliance, costs to budget,  variations/CEs, programme reviews etc to support the Client, end-users, Lead Designer, and Contract Lead | **+** | **+** | **+** |
| **Maintain effective communication channels between parties:** | **+** | **+** | **+** |
| **Design/approval:** assist contractor/supply-chain installation drawings production/sign-off |  |  | **+** |
| **Design/approval:** approve/sign-off contractor/supply-chain installation drawings | **+** | **+** |  |
| **Commercial input:** support accurate commercial management of works with input to applications, compensation  events/variations etc | **+** | **+** | **+** |
| **Attendance:** Visit the works at appropriate intervals and inspect the progress and quality of the workmanship and materials for compliance with the contract documents and good building practice – fulfilling the role of NEC Supervisor or JCT Clerk of Works or supporting the fulfilment of this role when undertaken by others. | **+** | **+** | **+** |
| **Coordination between parties**: attending meetings/dialogue and monitor timely provision of client/stakeholder information and approvals | **+** | **+** | **+** |
| **Providing client/stakeholders with technical advice/reports**: Support the client, advising on suitability of Contractor/design team proposals, programmes etc with recommendations to resolve areas of concern. | **+** | **+** | **+** |
| **Witnessing, testing & commissioning:** to demonstrate full functionality, balancing of systems, sign-off of records, suitable training of end-users etc | **+** | **+** | **+** |
| **Reporting:** Monitor/track progress providing appropriate reporting and risk/opportunity management, using early warnings etc. Supporting client and instigating corrective actions | **+** | **+** | **+** |
| **Records:** ensuring client, NEC Project Manager or Contract Administrator have as-built records and data for Health and Safety File and the Building Log Book, including an operation and maintenance manual for the electrical services | **+** | **+** | **+** |
| **Government Soft Landings:** Finalise end user training, occupation and aftercare programme in line with Government Soft Landings strategy for successful handover. | **+** | **+** | **+** |
| **End-user engagement:** End-user engagement to allow a smooth transition at handover. | **+** | **+** | **+** |
| **Media engagement:** Media engagement to foster goodwill in the community and celebrate success. | **+** | **+** | **+** |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. | **+** | **+** | **+** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Handover and Close Out & In Use** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Handover control:** Provide maintenance details and operating manuals with record drawings in hard and electronic copy and submit to the Client, end-users, Lead Designer, and Contract Lead | **+** | **+** | **+** |
| **Performance management:** At handover and after the completion of making good defects, submit a report on  contractor/electrical sub-contractor’s performance to the client | **+** | **+** | **+** |
| **Commercial input:** Assist in the preparation of the final account. | **+** | **+** | **+** |
| **Effective closure of project:** Oversight of storage of certificates, manuals, as-builts, CAFM updates etc | **+** | **+** | **+** |
| **Verify project outcomes:** Verify project outcomes against client drivers to ensure positive community, environmental and economic outcomes. | **+** | **+** | **+** |
| **Benchmark report:** Prepare benchmark report to provide future framework projects with valuable data. | **+** | **+** | **+** |

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| **Support enhanced aftercare tasks:** Engagement with FM team, client team and end users to ensure optimal asset performance and support enhanced building health check after 12 and 24 months. | **+** | **+** | **+** |
| **Complete post project review:** Complete post project review, benefits realisation and customer listening process. | **+** | **+** | **+** |

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**Structural Engineering**

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| **The Consultant will be responsible for all aspects of Structural Engineering.**  **The Consultant’s Structural Engineering team may be appointed independently, as part of the Client’s design team or as a Client Adviser to support Contractor-led/Design & Build solutions. The Lead Designer will co-ordinate and integrate Structural Engineering activities with the work of other design contributors however employed.**  **For projects where the services content forms the majority or all of the work relate to Structural Engineering the Consultant’s Structural Engineering Team may be required to act as the Lead Designer and co-ordinate and integrate the work of other design contributors however employed.**  **As part of this role the Consultant should expect to deliver the following Structural Engineering outcomes/actions.** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Generally** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Attendance/engagement:** activities should include convening/arranging and attending/chairing meetings as necessary to effectively deliver the client’s requirements, for example: client/stakeholder engagement, Soft Landing/Plan for Use, Design, Digital Execution/BIM, Project, Site Logistics/constraints, and others. Associated activities include taking/issuing comprehensive notes of each meeting and maintaining meetings are well facilitated and productive. | **+** | **+** | **+** |
| **Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate Plan of Work Strategies to deliver project success through combined skills of project stakeholders including design team, contractor(s), specialists, supply-chain etc. | **+** | **+** | **+** |
| **Contract Management:** where requested provide contract management **(Contract Lead)** duties, otherwise supporting their fulfilment by others, as appropriate to the main form of contract e.g. NEC ECC Supervisor, Project Manager or NEC PSC Service Manager duties, JCT Contract Administrator, Clerk of Works etc. Includes coordinating with other contract roles. | **+** | **+** | **+** |
| **BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. | **+** | **+** | **+** |
| **Design Management:** Lead and co-ordinate design or support coordination of Structural Engineering with design work done by the client’s design team, contractor’s design contributors, specialist 3rd party contractors, etc. Obtain quotations and other information in connection with specialist work. |  |  | **+** |
| **Design Management:** Lead and co-ordinate design or support coordination of Structural Engineering with design work done by  the client’s design team. Monitor ongoing development of Contractor’s Structural Engineering Design.  Obtaining quotations and other information in connection with specialist work prior to the Contractor’s appointment. | **+** | **+** |  |
| **Statutory compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations. | **+** | **+** | **+** |
| **Supervision:** Where requested, fulfil the NEC Supervisor or Clerk of Works duties, otherwise supporting their fulfilment of by others. | **+** | **+** | **+** |
| **Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner. |  |  | **+** |

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| **Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner unless Tasks and Processes allocated to Contractor/Contractor’s design team. | **+** | **+** |  |
| **Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other design team members including contributors for contractor design portions/ECI. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage. |  |  | **+** |
| **Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other client advisers and design disciplines provided by the Contractor. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage. | **+** | **+** |  |
| **Common data environment:** Supporting the procurement and implementation of a common data environment platform. | **+** | **+** | **+** |
| **Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice. | **+** | **+** | **+** |
| **Sustainability and Carbon Reduction Plan:** Scope and plan sustainability and carbon strategy to ensure sustainability, environmental enhancement and carbon reduction are embedded into project delivery. | **+** | **+** | **+** |

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| **Strategic Definition & Preparation and Brief** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Effective means to develop appreciation of client and its project**: e.g. Discuss/map client’s Requirements/Business Case, Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and any financial limits, whole-life targets, construction strategy; assess these and give general advice on how to proceed; maintain effective lines of communication. | **+** | **+** | **+** |
| **Due diligence:** Carry out site appraisal and obtain/investigate any reasonably accessible data and information relating to the project and relevant to the works. E.g. Advise on need to carry out any geotechnical investigations, topographical surveys special surveys, investigations or model tests to be carried out under the consulting engineer’s direction. Prepare a specification/Scope for such surveys and investigations and evaluate and interpret the results | **+** | **+** | **+** |
| **Collaborative review:** Undertake, with other appointed client advisers/design team members/Contractor Design Contributors  etc, technical appraisals as may be necessary to determine the feasibility of the client’s structural solution requirements, programme, budget etc |  |  | **+** |
| **Collaborative review:** Undertake, with other client advisers/design team members and (contractor/contractor’s design team  where appointed) technical appraisals as may be necessary to determine the feasibility of the client’s structural solution requirements, programme, budget etc | **+** | **+** |  |
| **Commercial input:** Work with other client advisers/design team members & contributors/contractor/specialists to provide an approximation of cost based upon unit volume, unit area or similar available statistics | **+** | **+** | **+** |
| **Discharge responsibilities as allocated:** Diligently discharge project roles, responsibilities complying with communication methodology, common standards, Digital Execution/Building Information Modelling (BIM) and technology standards and strategy, schedules of services and initial project brief; agreeing strategy/actions to efficiently meet/deliver project and quality objectives | **+** | **+** | **+** |

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| and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality). |  |  |  |
| **Add Value:** identify the various actions at each stage including proposals for additional research, surveys, investigations and Risk and Value Management Modelling, etc. For example, agree Sustainability Strategy, Maintenance & Operational Strategy, Handover Strategy etc to meet the client’s brief and stakeholders’ objectives. | **+** | **+** | **+** |
| **Value management/Optioneering:** Confer with the client and other parties including members of the design team, contractor etc., on the options and alternative methods of meeting the client’s requirements having regard to the means of procuring, types of contract, timing, funding, resources, site conditions etc | **+** | **+** | **+** |
| **Communication**: use communication channels including reporting and authorisation procedures to operate with the client, maintaining effective communication between parties. | **+** | **+** | **+** |
| **Government Soft Landings:** Develop Soft Landings Strategy – early engagement and preparation for successful handover and operation. | **+** | **+** | **+** |
| **ISO44001 Collaboration Workshop:** In addition to the collaboration review we will build in an ISO44001 collaboration workshop to ensure the project adhered to accredited standards and status. | **+** | **+** | **+** |
| **Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project. | **+** | **+** | **+** |
| **Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage. | **+** | **+** | **+** |
| **Best Practice Workshop:** Conduct a best practice workshop to identify innovationsand best practice solutions to be adopted into project delivery. | **+** | **+** | **+** |
| **Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme. | **+** | **+** | **+** |
| **Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage. | **+** | **+** | **+** |

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| **Concept Design, Spatial Coordination and Technical Design** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Support establishment of the team/Procurement:** supporting lead adviser/client design team member in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered structural elements. |  |  | **+** |
| **Support establishment of the team/Procurement:** supporting lead adviser/client design team member in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered items. Assisting any novations and/or Contractor’s procurement of structural engineering design contributors. | **+** | **+** |  |
| **Teambuilding:** Assist onboarding of new project team members including the Contractor, working to establish  reporting/communication channels between parties and cultural alignment |  |  | **+** |
| **Teambuilding:** Whenever Contractor appointed, work with the Contractor, supporting onboarding of all new project team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural alignment | **+** | **+** |  |
| **Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with stakeholders including the client’s advisers/design team, with particular reference to structural elements and specialist work affecting the structure. |  |  | **+** |

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| **Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with stakeholders including the Contractor/Contractor’s design team, with particular reference to structural elements and specialist work affecting the structure | **+** | **+** |  |
| **Due diligence:** Consult any local or any other authority necessary in connection with the structural design of the works and prepare details and calculations as necessary to the appropriate Authorities |  |  | **+** |
| **Due diligence:** Consult any local or any other authority necessary in connection with the structural design of the works and prepare details and calculations as necessary to the appropriate Authorities. Once appointed ensure Contractor maintains ongoing due diligence requirements | **+** | **+** |  |
| **Communication & collaboration**: Maintain effective communication/information exchange/collaboration between parties such as loading data for the engineering services showing locations and approximate sizes of plant rooms, major items of plant, and service run; also approximate weights of any item affecting architectural concepts and structural design to ensure compatibility. |  |  | **+** |
| **Communication & collaboration**: Maintain effective communication/information exchange/collaboration between parties reviewing data/proposals for compatibility, ensuring parties benefit from specialist expertise, facilitating specialist workshops, peer reviews etc | **+** | **+** |  |
| **Concept Design:** With other stakeholders including end-users, design team members, Contractor Design Contributors (where appointed) etc support development of concept design and prepare calculations, drawings, and specification of the works within the cost plan limit. |  |  | **+** |
| **Concept Design:** Where Contractor appointed, work with Contractor and other stakeholders to support development of concept design from the outline proposals taking into account amendments requested by the client and review Contractor’s calculations, drawings and specification of the works within the cost plan limit.  Where no Contractor appointed, as client led/Traditional activities. | **+** | **+** |  |
| **Commercial input**: In conjunction with the client advisers/design team members & contributors/contractor/specialists providing advice on the cost for the structural design solution for the project. | **+** | **+** | **+** |
| **Coordination:** Co-ordinate any structural design work, with designs carried out by other consultants, specialist contractors, sub- contractors, and suppliers; obtain quotations and other information in connection with the structural installations. | **+** | **+** | **+** |
| **Technical advice/design reviews**: Continually validating designs/programme, advising the client/client advisers on suitability, and ensuring design elements properly co-ordinated and integrated. |  |  | **+** |
| **Technical advice/design reviews**: Continually validating designs/programme, advising the client on the suitability of proposed solutions, and ensuring design elements properly co-ordinated and integrated. | **+** | **+** |  |
| **Reporting:** Prepare progress reports and final report to client, including fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks; highlighting project’s compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed. |  |  | **+** |
| **Reporting:** Prepare progress reports and final report to client, ensuring Contractor includes fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks. Support client by confirming project’s compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed. | **+** | **+** |  |
| **Spatial Coordination/Technical Design:** With other client advisers/design team members including contractor’s design contributors where appointed, develop spatial coordination proposals, design and technical information to enable tenders to be  invited including drawings, schedules and specification of materials and standard of workmanship. Submit final  design/specification/Scope/Works Information to be included in the works with the associated estimates and assist in preparation of report for the client. |  |  | **+** |

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| **Spatial Coordination:** With other client advisers/design team members and Contractor (where appointed), develop spatial coordination concept design and information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship as appropriate to required appointment stage.  If already appointed, oversee Contractor’s development of spatial coordination proposals into technical design/production information. Assessing final designs for each of the structural component including services runs etc to be included in the works with the associated estimates and assist in preparation of report for the client. | **+** | **+** |  |
| **Package coordination:** Co-ordinate any structural installation design work, from design team, contractor’s Design contributors, specialist 3rd parties; obtain quotations and other information in connection with the structural works. |  |  | **+** |
| **Package coordination:** Monitor coordination of any structural design work. | **+** | **+** | **+** |
| **Specialist procurement:** Where structural works/installations are to be tendered separately obtain list of tenderers from the client or assist in the preparation of a tender list, invite tenders from approved contractors; appraise and report on tenders received. If necessary, contribute to negotiation of reductions in tenders, in consultation with the Client, end-users, Lead Designer, and Contract Lead. | **+** | **+** | **+** |
| **Procurement:** Monitor Contractor’s procurement of structural works packages, reviewing decisions on shortlisting, MEAT etc to ensure value for money optimised. | **+** | **+** |  |
| **Assists and support approval process:** Providing timely and accurate structural drawings/calculations etc for Building  Regulations, responding to any queries / conditions.  Examine, check and comment on shop fabrication drawings, connection calculations and details, standard details, reinforcement drawings, bar bending schedules, specifications, and any other specialists details and calculations as required, etc. in respect of the conformity with the Structural Engineering design and in particular in respect of general dimensions, structural adequacy of members and connections and compliance with performance criteria. |  |  | **+** |
| **Assists and support approval process:** Providing timely assessments of Contractor’s structural drawings/calculations etc for Building Regulations, responding to any queries / clarification requests.  Examine, check and comment on shop fabrication drawings, connection calculations and details, standard details, reinforcement drawings, bar bending schedules, specifications, and any other specialists details and calculations as required, etc. in respect of the conformity with the Structural Engineering design and in particular in respect of general dimensions, structural adequacy of members and connections and compliance with performance criteria | **+** | **+** |  |
| **Validation:** Collaboratively re-examine proposals to determine their ability to meet client/stakeholders’ objectives/requirements. | **+** | **+** | **+** |
| **Statutory consents:** Provide support to the team in securing any statutory consents (including the planning application where required) to ensure the project is delivered in line with time requirements. | **+** | **+** | **+** |
| **Operation and Maintenance (O&M) Strategy:** Development of O&M strategy, handover strategy, testing and commissioning. | **+** | **+** | **+** |
| **Scape Engage Portal:** Tender opportunity advertised on our bespoke Engage Portal Dynamic Purchasing System. | **+** | **+** | **+** |
| **Benefits review:** Review of progress against intended benefits considers time, tools and resource needed. | **+** | **+** | **+** |
| **Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. | **+** | **+** | **+** |
| **Value for money update:** Provide client with update on VfM data through use of our VfM tool. | **+** | **+** | **+** |
| **Engagement with end-user community:** Engage with end-user community to enable users to be key influencers in design development. | **+** | **+** | **+** |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. | **+** | **+** | **+** |

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| **Manufacturing and Construction** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Management:** Oversee/report on progress including monitoring compliance, costs to budget, variations/CEs, programme reviews etc to support the Client, end-users, Lead Adviser, and Contract Lead, including approvals such as advise on required samples and testing procedures of structural elements; inspect and comment on sample and test results | **+** | **+** | **+** |
| **Maintain effective communication channels between parties:** | **+** | **+** | **+** |
| **Design/approval:** assist contractor/supply-chain installation drawings production/sign-off |  |  | **+** |
| **Design/approval:** approve/sign-off contractor/supply-chain installation drawings | **+** | **+** |  |
| **Commercial input:** support accurate commercial management of works with input to applications, compensation  events/variations etc | **+** | **+** | **+** |
| **Attendance:** Visit the works at appropriate intervals and inspect the progress and quality of the workmanship and materials for compliance with the contract documents and good building practice – fulfilling the role of NEC Supervisor or JCT Clerk of Works or supporting the fulfilment of this role when undertaken by others. | **+** | **+** | **+** |
| **Coordination between parties**: attending meetings/dialogue and monitor timely provision of client/stakeholder information and approvals | **+** | **+** | **+** |
| **Providing client/stakeholders with technical advice/reports**: Support the client, advising on suitability of Contractor/design team proposals, programmes etc with recommendations to resolve areas of concern. | **+** | **+** | **+** |
| **Witnessing, testing & commissioning:** to demonstrate full functionality, balancing of systems, sign-off of records, suitable training of end-users etc | **+** | **+** | **+** |
| **Reporting:** Monitor/track progress providing appropriate reporting and risk/opportunity management, using early warnings etc. Supporting client and instigating corrective actions | **+** | **+** | **+** |
| **Records:** ensuring Client, end-users, Lead Designer, and Contract Lead have as-built records and data for Health and Safety File and the Building Log Book, including an operation and maintenance manual | **+** | **+** | **+** |
| **Government Soft Landings:** Finalise end user training, occupation and aftercare programme in line with Government Soft Landings strategy for successful handover. | **+** | **+** | **+** |
| **End-user engagement:** End-user engagement to allow a smooth transition at handover. | **+** | **+** | **+** |
| **Media engagement:** Media engagement to foster goodwill in the community and celebrate success. | **+** | **+** | **+** |
| **Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. | **+** | **+** | **+** |

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| **Handover and Use** | **D&B**  **1** | **D&B**  **2** | **Trad** |
| **Handover control:** Provide maintenance details and operating manuals with record drawings in hard and electronic copy and submit to the contract administrator | **+** | **+** | **+** |
| **Performance management:** At handover and after the completion of making good defects, submit a report on contractor/sub- contractor’s performance to the client | **+** | **+** | **+** |

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| **Commercial input:** Assist in the preparation of the final account. | **+** | **+** | **+** |
| **Effective closure of project:** Oversight of storage of certificates, manuals, as-builts, CAFM updates etc | **+** | **+** | **+** |
| **Verify project outcomes:** Verify project outcomes against client drivers to ensure positive community, environmental and economic outcomes. | **+** | **+** | **+** |
| **Benchmark report:** Prepare benchmark report to provide future framework projects with valuable data. | **+** | **+** | **+** |
| **Support enhanced aftercare tasks:** Engagement with FM team, client team and end users to ensure optimal asset performance and support enhanced building health check after 12 and 24 months. | **+** | **+** | **+** |
| **Complete post project review:** Complete post project review, benefits realisation and customer listening process. | **+** | **+** | **+** |

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**Commercial Surveyor**

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| **A Commercial Surveyor may be appointed as a Client Adviser independently or as part of a wider team.**  **The consultancy services may include valuation of commercial and residential land and buildings, advice on marketing strategy of surplus assets and subsequent disposal, identification of suitable land and buildings for acquisition, undertaking of landlord and tenant matters including rent review and lease renewal, advice and negotiation and settlement of compulsory purchase and compensation claims.**  **As part of this role the Commercial Surveyor should expect to deliver the following outcomes/actions.** |

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| **Generally** |
| To provide general practice surveying services for land and property on behalf of Clients. |
| **Project execution plan:** Input into Project Execution Plan to provide a road map for delivery. |
| **Project initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice. |
| **Value for Money:** Input into VfM workshop/reporting outputs. |
| **Social value:** Input into social value workshop/reporting outputs. |
| **Sustainability and Carbon Reduction Plan:** Input into sustainability and carbon delivery plans to ensure sustainability, environmental enhancement and carbon reduction are embedded into the project. |
| **Client satisfaction surveys:** Input into client satisfaction surveys and lessons learnt process to drive continuous improvement. |
| **Post-project process:** Input into post-project feedback process and enhanced aftercare where required. |

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| **Disposal (sales) of Surplus Freehold and Leasehold Land and Property** |
| Provision of a marketing strategy to the Client for the disposal of surplus land and property including the sale or surrender of interests in land and property; such services to include (but not be limited to):-   * undertaking research into market sectors likely to have an interest in such disposal; * advice to the Client on the most suitable publications for such disposal; * guide prices for such disposal; * the likely timescale for such disposal; * advice on the best method of disposal, auction, tender, private treaty, etc. |
| Research of likely advertising costs, including (but not exclusively) boards, photos, printing, distribution and liaison with publications, etc. |
| Following agreement of advertising budgets with the Client, arrangement of advertising, including design, layouts, boards, photographs etc. |
| Marketing of properties to be disposed of including arrangements of visits by third parties in liaison with the Client, conducting site visits and discussions/negotiations with third parties, third party agents and other relevant parties on site, administration of tender documentation including its preparation and delivery to tenderers and the arrangement of the receipt of tenders |
| Evaluation of tender bids and offers and advice to the Client as to the most suitable tenders and offers. |
| On written request by the Client, proceed with the disposal including any liaison necessary with relevant parties. |

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| In relation to the disposal of leasehold interest, the same services above. |
| Negotiation with relevant parties regarding the assignment, sub-letting or surrender of the interest of any property by Client as above. |
| **Communication:** Utilise significant communication network including the use of Propex, EGI, etc. to develop strong relationships with buyers and developers to identify best deal for the client. |
| **Agents Insight:** Use Agents Insight software to manage and promote disposal. |
| **Property agents:** Use an internationally recognised property agent for all disposals over £5m to provide the client with a speedy disposal process. |
| **Property auctions:** Use modern methods of auction for property auctions with a predicted value of under £1m to achieve a higher price compared to traditional methods. |

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| **Acquisition (purchases) of Freehold and Leasehold Land and Property** |
| Provision of site searches to requirements identified by the Client in a given geographical area, including provision of:   * written reports; * dealing with vendors, developers and their agents; * shortlisting and evaluating options; * undertaking costing exercises to estimate full life cost of capital (acquisition and refurbishment) and ownership (running costs) including the time value of money; * provision of advice on the best locations of sites within the Client area, local and national property prices including rental and leasehold prices; availability of financial or other packages on property available in the marketplace. * identification of suitable land and buildings for acquisition either by agreement or through compulsory powers |
| Research for suitable land and property for the Client on instruction, including:   * examination of appropriate property publications; * liaison with property vendors; * visits to site; * advice to the Client on prices |
| Liaison with local planning authorities to ensure appropriateness of a site for use by the Client. |
| Carrying out site investigations for appraisal purposes including visits to sites, research into any obstacles to purchase, liaison with vendors, instruction of solicitors for land searches on behalf of the Client. |
| To assist in the formulation of land appraisals and planning development projects to achieve maximum potential value prior to disposal of surplus land and property assets. |
| Negotiation of terms with appropriate parties for freehold and/or leasehold acquisition of sites by the Client. |
| Negotiation of terms with appropriate parties in respect of licenses, easements and rights over property on behalf of the Client. |
| Liaison with building surveyors, architects and other such consultants in respect of work needed on land and property to meet the Client's requirements prior to or subsequent to acquisition. |
| Attendance by appropriate and suitably qualified officers as expert witnesses at public enquiries or any other enquiry where property is acquired or where planning permission is needed, as required by the Client. |
| Negotiations with third parties in respect of claims for compensation by or against the Client. |
| Negotiate and settle Compulsory Purchase claims |
| Attendance by appropriate and suitably qualified staff at Lands Tribunals as expert witnesses on behalf of the Client. |
| **Funding:** Provide advice on funding opportunities and leverage local and national funding streams for property investment. |
| **Revenue:** Provide advice on revenue options and guidance for authorities on revenue generation options. |

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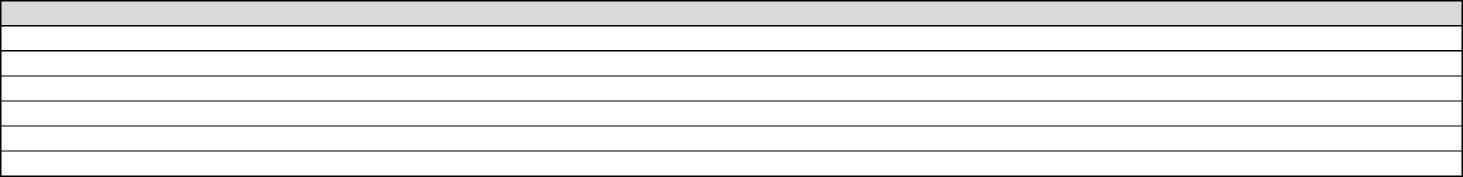
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| **Compulsory purchase order:** CPO service offering to ensure project is delivered in line with time, cost and quality requirements. |
| **CoStar:** Provide access to comparable data through CoStar software to highlight market intel in relation to deals and lease availability. |
| **Agents Insight:** Use of Agents Insight software to manage and promote acquisition to provide better value for money. |
| **Modern method of auction:** Use of modern method of auction – no fee charge to client, buyer pays for fees. |

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| **Capital valuations** |
| Carrying out Market Value and Existing Use Valuations of the Clients estate as requested in any year for accounting and other purposes as requested by the Client in accordance with the RICS valuation practice and guidance notes and the CIPFA guide 'Valuations for Accounting Purposes'. |
| The provision of annual updates to current existing use valuations in the form of a desk top appraisal of the original valuation figure, i.e. full valuations involving site visits, etc. are not required in respect of re-evaluations |
| Provision of individual market or existing use valuations of nominated properties as requested by the Client. |
| **IFRS16 accounting:** Advice on IFRS16 accounting standard to provide clients with value for money solutions. |
| **BCIS:** Develop BCIS to provide an auditable cost input to allow the client to start the valuation process earlier. |
| **Excel model:** Develop a robust and detailed auditable Excel model to provide the client with time savings on the project. |
| **Audit process:** Build strong relations with external auditors to facilitate year-end audit process to provide the client with no audit adjustments. |

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| **Rating valuation services** |
| Provide a comprehensive rating service to minimise rates costs in respect of all non-domestic properties. |
| Establishing the current statues of non-domestic rates at properties including relevant rating Client, ratable value, rates payable, appeals/tribunal status and savings made as a result of any appeals. |
| Advising the Client on the likely outcome and advisability of lodging appeals. |
| Lodging of appeals as necessary against the Valuation Officer's list. |
| All necessary surveys required to each property to enable negotiations to be conducted. |
| Detailed consideration of the assessments and negotiation with the Inland Revenue or relevant authority in an attempt to agree a satisfactory and fair ratable value. |
| Reporting to the Client with recommendations and details of financial implication of accepting or challenging rating decisions. |
| Preparation for and attendance at Rating Tribunals on behalf of the Client. |
| Provision of general advice on rating matters. |
| **Rate liabilities:** Exposure to rate liabilities – opportunity to mitigate rates is explored. |
| **Landlord and developments:** Advice on landlord and developments to ensure the project is delivered in line with quality requirements. |
| **Valuation Office Agency:** Collaboration with Valuation Office Agency to ensure best practice is adopted. |
| **Planning:** Provide advice in line with planning requirements to ensure the project is delivered to time requirements. |

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**Landlord and Tenant – Lease renewals and rent reviews**

Negotiating lease and license renewals on behalf of the Client with freeholder or freeholders' agents.

Negotiating rent reviews on behalf of the Client with landlords or landlords' agents.

Negotiating lease or license renewals on behalf of the Client with leaseholders or leaseholders' agents.

Negotiating rent reviews on behalf of the Client with tenants or tenants' agents.

Provision of advice and the assessment of the implications of clauses within leases or licenses and the wording of any agreements.

Advising the Client on the serving of appropriate Notices and arranging for such service of Notices where requested by the Client.

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| Resolution of any disputes relating to landlord and tenant matters including rent reviews and lease renewals by referral to third parties if necessary including any referrals and submissions to an independent expert, arbitrator or court as may be required. |
| **Storepoint Geo:** The use of Storepoint Geo to analyse catchment size, competition, travel data and demographics. |
| **Data management:** Create a bespoke data management system through Agents Insight to provide a central data management hub storing all property and tenancy information. |
| **Comparable data:** Provide access to comparable data to highlight market intel and ensure the project is delivered to cost requirements. |

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| **Other services** |
| **Dilapidations Services**   * On behalf of the Client negotiating claims for dilapidations against leaseholders and all relevant parties on the surrender of leases. * The provision of schedules of condition, including written reports and photographs. |
| **Tribunals**   * The Contractor will be required to provide general advice on an arrangement of referrals to Tribunals, Courts or Arbitration on behalf of the Client. |
| **Property Review**   * The Contract will be required to produce and present a report with strategic analysis of the estate portfolio to the Client as and when required. |
| **Local Planning Issues**   * Provision to the Client of strategic advice on the implications of the local, town, district and countywide plans including liaison with planning authorities in respect of specific issues. * Reviewing and updating the Client's information on the status of individual local plans and provision of updated reports summarising the relevant issues fo the Client on local strategy, housing, transport, employment, environment, recreation, town centre and shopping, including implications for the local Client properties and timescales for implementation. |
| **Strategic and General Advice**  The Consultant is required to provide to the Client general strategic and general property advice by suitably qualified personnel in appropriate disciplines, as  and when required, including preparing and presenting reports to Client officers and members. |
| **Client Services**   * To ensure that all commissions in respect of new work from the Client are the subject of an individual identification reference. * To attend regular review meetings with the Client. Information to be presented at such meetings shall include:- * a spreadsheet summarising current workload by project number * provision of a diary system to identify in advance forthcoming strategic events such as rent reviews, renewals and dilapidations obligations; * the provision of a spreadsheet summarising current status of all rating work, particularly the impact of any reduction in ratable value of rates payable; * the provision of a spreadsheet showing the status of each project. * At the end of the Delivery Agreement or upon its prior termination, to return to the Client all relevant information and records such as plans, drawings surveys, records leases, licenses, photographs, whether in hard copy or electronic format. |

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**Certificate Of Completion**

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| Envelope Id: 723751325A3A40ACBCEB220AB818C3EC  Subject: PCJV: Full Service DA [DIO, Client-Side Technical Advisor Net Zero 24-25, 6132]  Project Number: 6132  SCUID: SCA002531  Framework Code: CBE21  Doc Code DO NOT CHANGE: 9d800409-4745-48ad-b2ec-486409a9b60d  Source Envelope: | Status: Sent |
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