**SECTION TWO – FRAMEWORK SPECIFICATION**

1. **General Requirements – Ability to Deliver**

* 1. The Contracting Authority is wishing to appoint a number of Consultants across the 19 lots to deliver a national framework agreement delivering Public Sector Body Professional Services contracts. The following information details the general specification required for the framework agreement.
  2. Consultants appointed to the framework agreement shall be capable of managing multiple projects appointed through the framework agreement and employ a number of competent and qualified consultants to execute each project required by the Client Organisations. The following information details the characteristics required by Consultants: -

Lot number

1. Complete Service Solutions
2. Civil Engineering
3. Structural Engineering
4. Cost Consultants & Quantity Surveyors, Project & Programme Manager, Lead Consultant (covers Employers Agent)
5. Building Surveying
6. Building Services Engineering (M&E)
7. Architectural Design Services
8. Landscape Architectural Design Services
9. Site Supervisor / Clerk of Works
10. Asset / Estate Management
11. Funding Solutions & Bid Writing
12. Archaeological Services
13. Sustainability & Environmental Consultancy
14. Town & Master Planning
15. Heritage
16. Health & Safety Consultant inc Principle Designer services
17. Fire Engineer
18. Asbestos Consultancy
19. Water Consultancy including Legionella monitoring

**Lot 1 – Complete Service Solution covering Lot 2 to 19**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * To include all typical qualifications covering all Lots 2 to 19 | |
| **Typical Specification required to be carried out by the consultant** | |
| **General** |  |
| 1.1 | The role of the Appointed Consultant to this lot will be to ensure that they have the provision in place to cover all lots 2 to 19 within scope providing a multi-discipline approach to all Public Sector Bodies throughout the whole of the UK.  The first iteration of the Professional Services framework delivered strong financial and Social Value outcomes for Clients, SME’s and a wider stakeholder group.  The Lot 1 Consultant appointed to this Framework will be expected to deliver financial growth in the overall throughput of the framework, while focussing on three key areas.   1. The inclusion and development of a broad range of like-minded supply-chain partners (the eco-system) to extend the reach and awareness of the framework, enhance the offering to Clients and foster a commitment to the inclusion of as many smaller and medium sized providers alongside recognised Tier 1 organisations. 2. The Framework Managers want to move from an ‘acknowledgement’ basis for Social Value (SV) to an ‘accounting’ basis, and the appointed Lot 1 Consultant will become a leading advocate in demonstrable SV. This framework wants to deliver projects that have a direct Social return on Investment (directly and indirectly), and the Lot 1 Consultant will be required to assume a leadership role in helping the framework achieve its objectives for SV. 3. Technology has changed many traditional industries. It is absolutely clear that the future decision-makers, senior managers and managers within construction & consultancy will want different solutions that improve efficiency, VFM and also foster a stronger social and environmental conscience. The appointed Lot 1 Consultant will help support change and demonstrate a commitment to the adoption of technology across the complete eco-system to improve efficiency and transparency, reduce the ‘cost’ (financial and non-financial) of delivering projects, and increase Clients’ VfM.   The appointed Lot 1 Consultant will be required to attend quarterly performance reviews that will cover their own performance and KPIs as well as overall framework targets as the Lot 1 Consultant.   * Performance against their agreed business plan; an outline business plan will be required as part of their submission – this will cover revenue targets, growth expectations and resources committed – the plan needs to be monthly, quarterly and annually * Social Value performance – how is the framework progressing in ‘accounting for’ SV, project evidences, testimonials. What is the Lot 1 Consultant doing that could be shared with other suppliers – lessons learned. * Eco-system performance – activities (training materials and sessions developed and delivered, coaching, mentoring etc.), campaigns, success(es), lessons learned, next actions etc. The framework aspirations are:   + 100% engagement (either direct or indirect) with every Organisation appointed to this framework over the life of the framework agreement   + Inclusion of additional Micro, Small and Medium businesses over and above the existing supply chain(s) – taken from Clients own supply-chains or from new suppliers to the framework. The aspirations (numerically and relatively) will be agreed in the mobilisation phase. * Wider framework collaboration. How has the Lot 1 Consultant stimulated collaboration between the Professional Service providers (including themselves) and other framework contractors and suppliers – DPS, Medium Works, Major Works, etc. * Any other performance review(s) agreed throughout the life of the framework.   The appointed Lot 1 Consultant will be required to put forward a senior member of their management team to take a position on the Pagabo Foundation as a trustee and director. For more information see <https://www.pagabo.co.uk/pagabo-foundation> |

**Lot 2 – Civil Engineering**

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| **Typical Qualifications required by the consultant, memberships and associations** | | |
| * (IEng) Incorporated Engineering * (CEng) Civil Engineering * (Meng) Masters in Engineering * (ICE) The Institution of Civil Engineers membership * (IStructE) The Institution of Structural Engineers membership | | |
| **Typical Specification required to be carried out by the consultant** | | |
| **STAGE 1** | |  |
| 1.1 | | The Consultant shall carry out and submit a report for the Client Organisation. The report to  include: ‑   * a description and address of the property; * the dates during which the survey was undertaken; * the name and qualification of the person who carried out the survey; * advice on matters relating to Statutory and legal requirements including rights of * support and the like; * details of the present condition of the property /site disclosed by the survey; * whether further investigation is advised including a geotechnical investigation; * supporting drawings and/or photographs; * recommendations (and estimates of costs if applicable); * an anticipated programme for the completion of the Services; * the name and qualifications of the person signing the report who should be a * Partner or Director of the Consultant. |
| 1.2 | | Obtain an initial brief from the Client Organisation including the timescale for the Project and the financial limits. |
| 1.3 | | Contact the other Consultant Disciplines on the Project Team and ensure that the services listed in hereunder are fully coordinated with the services provided by those Consultants. |
| 1.4 | | Consult as necessary with any local or other authority on matters relating to the proposed civil engineering aspects of the design. |
| 1.5 | | Visit the site, evaluate the civil engineering implications and, in liaison with the other members of the Project Team, undertake such further studies as may be necessary in order to submit proposals and options to the Client Organisation including an anticipated programme and costs, and undertake all work necessary to obtain the Client Organisation’s approval to proceed on the basis of the agreed proposals. |
| 1.6 | | Undertake value management exercises. |
| 1.7 | | Undertake risk assessments. |
| 1.8 | | Obtain the Client Organisation’s approval to proceed to Stage 2. |
| **STAGE 2** | |  |
| 2.1 | | Identify surveys required and arrange for the carrying out of any surveys or other investigations authorised by the Client Organisation, interpret the results and, if necessary, make recommendations to the Client Organisation. |
| 2.2 | | Develop the civil engineering design within the approved cost and submit to the Client Organisation for approval. |
| 2.3 | | Where applicable, co-operate with the other members of the Project Team in the preparation of a cost plan for the Project based on the overall cost approved by the Client Organisation. |
| 2.4 | | Ensure that the civil engineering design is fully integrated with the overall design of the Project and that the Services can be completed within the amount allocated for civil engineering within any overall cost plan and within the programmed time. |
| 2.5 | | If necessary, advise the Client Organisation of the need to appoint specialist contractors to design or execute sections of the Services and obtain the Client Organisation’s approval to approach the contractors concerned. |
| 2.6 | | Monitor the development of the scheme design against the approved costs and report any anticipated difficulty to the Client Organisation including proposals for overcoming that difficulty and obtain the Client Organisation’s instructions in sufficient time to allow corrective action to be taken. |
| 2.7 | | Where the Client Organisation has indicated the possibility of a change to the agreed brief during the design phase, inform the Client Organisation of the cost and programme implications and obtain the Client Organisation’s instructions. |
| 2.8 | | Attend all design team meetings, and report on matters appertaining to the civil engineering design and provide advice thereon to the other Consultant Disciplines as may be necessary. |
| 2.9 | | Complete the civil engineering design up to tender stage and provide all information necessary for the completion of the tender documents. |
| 2.10 | | Ensure that life cycle costings and environmental assessment techniques are applied to the Project and adopt solutions giving the best overall value for money and, where this may result in the cost limit for the Services being exceeded, make recommendations to the Client Organisation and obtain instructions. |
| 2.11 | | With the other members of the Project Team, consider the most suitable options for the procurement of the Services, make recommendations to the Client Organisation and obtain instructions. |
| 2.12 | | With the other members of the Project Team, make recommendations to the Client Organisation on the suitability of contractors who may be invited to submit tenders for the Services and any specialist Services and obtain instructions. |
| 2.13 | | In liaison with the other members of the Project Team, ensure that all drawings, specifications, schedules, or other documents necessary for the placing of contracts are completed and are fully coordinated, are in accordance with the brief approved by the Client Organisation and are available on the programmed date. |
| 2.14 | | Prepare such details relating to the Services as may be required for submission to any appropriate authority and obtain any necessary approvals. |
| 2.15 | | Ensure that a pre-tender cost check on the design of the building services is prepared based on the tender documentation and inform the Client Organisation of the result of that check. |
| 2.16 | | Discuss with the Client Organisation the need for site inspection staff and receive instructions. |
| 2.17 | | Agree final arrangements for the obtaining of tenders with the Client Organisation. |
| 2.18 | | Prepare all further designs, specifications and drawings necessary for the information of the contractor during the execution of the Services. |
| 2.19 | | Invite tenders from contractors included on the list approved by the Client Organisation and arrange for tenders to be returned direct to the Client Organisation in accordance with the Client Organisation’s tendering procedure. |
| 2.20 | | Examine tenders received, make recommendations to the Client Organisation and advise on any corrective action which may be required if the lowest tender is higher that the approved cost for the Services and obtain the Client Organisation’s instructions. |
| 2.21 | | Obtain the Client Organisation’s decision regarding the acceptance of a tender. |
| 2.22 | | Undertake value management exercises. |
| 2.23 | | Undertake risk assessments. |
| 2.24 | | Obtain the Client Organisation’s approval to proceed to Stage 3. |
| **STAGE 3** | |  |
| 3.1 | | When required, provide the Client Organisation with drawings, specifications or other documents necessary for entering into a contract (or alternatively follow the procedures for the appointment of specialist sub-contractors). |
| 3.2 | | Undertake value management exercises. |
| 3.3 | | Undertake risk assessments. |
| 3.4 | | In collaboration with the other members of the Project Team, assist the Project Manager in administering the terms of the Services contract during operations on site and relating to the completion of the Services. |
| 3.5 | | Attend the regular meetings with the Contractor and other members of the Project Team as necessary in order to monitor the progress of the Services and the Contractor's need for design information. |
| 3.6 | | Ensure that rigorous safety policies are in place and are implemented by the Contractor and that there is adequate protection for the public and others. Ensure that all Health and Safety Statutory Requirements or Regulations are being observed by all those responsible for either designing or constructing the Services and that adequate monitoring procedures are in place to ensure day to day compliance. |
| 3.7 | | Ensure that rigorous quality management procedures are in place throughout the construction phase. |
| 3.8 | | Visit the site at regular intervals during the construction of the Services in order to inspect the quality of the work and to monitor progress and ensure that the Services are executed in accordance with the contract and in accordance with good engineering practice. |
| 3.9 | | Advise the Project Manager on the need for special inspections and tests and, following approval, arrange for the inspections and tests to be undertaken. Inform the Client Organisation of the results and, with the approval of the Project Manager, take necessary action to ensure that any deficiencies are rectified. |
| 3.10 | | Inform the Project Manager of any contractual difficulties which may arise during the course of the contract and obtain the Project Manager's instructions. |
| 3.11 | | Establish post contract cost control procedures in order to ensure financial control covering the issue of instructions which vary the Services and the issue of cost reports to the Project Manager. |
| 3.12 | | Where relevant, issue interim payment certificates (or make recommendations for payment) in accordance with the terms of the construction contract. |
| 3.13 | | Inform the Project Manager four weeks prior to the anticipated date of completion of the Services. |
| 3.14 | | Arrange for any commissioning tests to be carried out by the contractor, assess the results and ensure that the tests are satisfactory and meet the performance and other requirements stipulated in the Services contract. |
| 3.15 | | If any commissioning tests fail to meet the requirements in any way, ensure that, at no cost to the Client Organisation, the Contractor complies with his contractual obligations and rectifies any defects in the Services and, subsequently, arrange for such further tests to be undertaken until satisfactory results are obtained. |
| 3.16 | | Where relevant, issue a certificate to the Contractor relating to the completion of the Services. |
| **STAGE 4** | |  |
| 4.1 | | Provide the Client Organisation with a set of record drawings, maintenance manuals and detailed instructions on the operation and maintenance of building services generally. |
| 4.2 | Advise the Client Organisation on the resources and skills required to operate and maintain the completed Services and make recommendations on the timing of their appointment or the need for any maintenance agreements. | |
| 4.3 | Issue a list of defects to the Contractor at the appropriate time in accordance with the terms of the Services contract. | |
| 4.4 | Ensure that the Contractor rectifies the defects within a reasonable time and issue a certificate to the Contractor that all defects have been made good in accordance with the terms of the construction contract. | |
| 4.5 | Report on the final cost of the Services to the Client Organisation. | |

**Lot 3 – Structural Engineering**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * (BEng) Bachelors in Engineering * (Meng) Masters in Engineering * Certificate in Structural Behaviour * (EAL) Advanced Diploma in Engineering * (IStructE) The Institution of Structural Engineers membership | |
| **Typical Specification required to be carried out by the consultant** | |
| **STAGE 1** |  |
| 1.1 | The Consultant shall carry out a structural survey and submit a report to the  Client Organisation. The report to include: ‑   * a description and address of the property; * the dates during which the survey was undertaken; * the name and qualification of the person who carried out the survey; * advice on matters relating to Statutory and legal requirements including rights of support and the like; * details of its present condition of the property disclosed by the survey; * whether any further investigation is advised including a geotechnical investigation; * supporting drawings and/or photographs; * recommendations (and estimated costs if applicable); * an anticipated programme for the completion of the Services; * the name and qualification of the person signing the report who should be a Partner or Director of the Consultant. |
| 1.2 | Obtain an initial brief from the Client Organisation including the timescale for the Project and the financial limits. |
| 1.3 | Contact the other consultant disciplines on the Project Team and ensure that the Services listed hereunder are fully coordinated with the Services provided by other Contractors. |
| 1.4 | Consult as necessary with any local or other authority on matters relating to the proposed structural design of the Services. |
| 1.5 | Visit the site, evaluate structural implications and in liaison with the other members of the Project Team, undertake such further studies as may be necessary in order to submit proposals and options to the Client Organisation including an anticipated programme and costs and undertake all work necessary to obtain the Client Organisation’s approval to proceed on the basis of the agreed proposals. |
| 1.6 | Undertake risk assessments. |
| 1.7 | Undertake value management exercises. |
| 1.8 | Obtain the Client Organisation’s approval to proceed to Stage 2. |
| **STAGE 2** |  |
| 2.1 | Identify surveys required and arrange for the carrying out of any geotechnical or other investigations authorised by the Client Organisation, interpret the results and, if necessary, make recommendations to the Client Organisation. |
| 2.2 | Develop the structural engineering design within the approved cost and submit to the Client Organisation for approval. |
| 2.3 | If necessary, advise the Client Organisation of the need to appoint specialist contractors to design and execute sections of the Services and obtain the Client Organisation's approval to approach the contractors concerned or to obtain competitive tenders. |
| 2.4 | Ensure that the structural engineering design is fully integrated with the overall design of the project and that the Services can be completed within the amount allocated for structural engineering within any overall cost plan and within the programmed time. |
| 2.5 | Where applicable, co-operate with the other members of the Project Team in the preparation of a cost plan for the Project based on the overall cost approved by the Client Organisation. |
| 2.6 | Attend all design team meetings, report on matters appertaining to the structural design and provide advice thereon to other consultant disciplines as may be necessary. |
| 2.7 | Monitor the development of the scheme design against the approved cost and report any anticipated difficulty to the Client Organisation including proposals for overcoming that difficulty and obtain the Client Organisation’s instructions in sufficient time to allow corrective action to be taken. |
| 2.8 | Where the Client Organisation has indicated the possibility of a change to the agreed brief during the design phase, inform the Client Organisation of the cost and programme implications and obtain the Client Organisation’s instructions. |
| 2.9 | Complete the structural design up to tender stage and provide all information necessary for the completion of tender documentation. |
| 2.10 | If applicable make recommendations to the Client Organisation on the suitability of contractors who may be invited to submit tenders for the structural Services and obtain instructions. |
| 2.11 | Ensure that life cycle costings and environmental assessment techniques are applied to the Project and adopt solutions giving the best overall value for money and, where this may result in the cost limit for the Services being exceeded, make recommendations to the Client Organisation and obtain instructions. |
| 2.12 | With the other members of the Project Team, consider the most suitable options for the procurements of the Services, make recommendations to the Client Organisation and obtain instructions. |
| 2.13 | With the other members of the Project Team, make recommendations to the Client Organisation on the suitability of contractors who may be invited to submit tenders for the Services and any specialist Services and obtain instructions |
| 2.14 | Ensure that all drawings, specifications, schedules, or other documents necessary for the placing of the construction contract are completed and are fully coordinated, are in accordance with the brief approved by the Client Organisation and are available on the programmed date. |
| 2.15 | Prepare such calculations and details relating to the Services as may be required for submission to any appropriate authority and obtain any necessary approvals. |
| 2.16 | Ensure that a pre-tender cost check is prepared based on the tender documentation and inform the Client Organisation of the result of that check. |
| 2.17 | Discuss with the Client Organisation the need for site inspection staff and obtain instructions. |
| 2.18 | Agree final arrangements for the obtaining of tenders with the Client Organisation. |
| 2.19 | Prepare further designs, specifications and drawings including, if necessary, bar bending schedules for the information of the contractor executing the Services. |
| 2.20 | Invite tenders from contractors included on the list approved by the Client Organisation and arrange for tenders to be returned direct to the Client Organisation in accordance with the Client Organisation’s tendering procedure. |
| 2.21 | Copy all correspondence regarding the obtaining of tenders direct to the Client Organisation. |
| 2.22 | Examine tenders received, make recommendations to the Client Organisation and advise on any corrective action which may be required if the lowest tender is higher than the approved cost for the Services and obtain the Client Organisation’s instructions. |
| 2.23 | Obtain the Client Organisation’s decision regarding the acceptance of a tender. |
| 2.24 | Undertake value management exercises. |
| 2.25 | Undertake risk assessments. |
| 2.26 | Obtain the Client Organisation’s approval to proceed to Stage 3. |
| **STAGE 3** |  |
| 3.1 | Where required, provide the Client Organisation with drawings or other documents necessary for entering into contract (or alternatively follow the procedure for the appointment of specialist sub-contractors). |
| 3.2 | Undertake value management exercises. |
| 3.3 | Undertake risk assessments. |
| 3.4 | In collaboration with the other members of the Project Team, assist the Project Manager in administering the terms of the Services contract during operations on site and relating to the completion of the Services. |
| 3.5 | Attend the regular meetings with the Contractor and other members of the Project Team as necessary in order to monitor the progress of the Services and the Contractors need for design information. |
| 3.6 | Visit the site at regular intervals during the construction of the Services in order to inspect the quality of the work and to monitor progress and ensure that the Services are executed in accordance with the Services contract and in accordance with good engineering practice. |
| 3.7 | Ensure that rigorous safety policies are in place and are implemented by the contractor and that there is adequate protection for the public and others. Ensure that all Health and Safety Statutory Requirements or Regulations are being observed by all those responsible for either designing or constructing the Services and that adequate monitoring procedures are in place to ensure day to day compliance. |
| 3.8 | Ensure that rigorous quality management procedures are in place throughout the construction phase. |
| 3.9 | Advise the Project Manager on the need for special inspection and tests and, following approval, arrange for the inspection and tests to be undertaken. |
| 3.10 | Inform the Project Manager of any contractual difficulties which may arise during the course of the construction contract and obtain the Project Manager's instructions. |
| 3.11 | Establish post construction contract cost control procedures in order to ensure financial control covering the issue of instructions which vary the Services and the issue of cost reports to the Project Manager. |
| 3.12 | Inform the Project Manager four weeks prior to the anticipated date of Practical Completion. |
| **STAGE 4** |  |
| 4.1 | Where relevant, provide the Client Organisation with a set of record drawings. |
| 4.2 | Issue a list of defects to the Contractor at the appropriate time in accordance with the terms of the Services contract. |
| 4.3 | Ensure that the contractor rectifies the defects within a reasonable time and issue a Certificate to the Contractor when all defects have been made good. |
| 4.4 | Report the final cost of the Services to the Client Organisation. |
| 4.5 | Where relevant, issue a Final Certificate to the Contractor. |

**Lot 4 - Quantity Surveying, Project and Programme Management and Lead Consultant**

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| **Typical Qualifications required by the consultant, memberships and associations** | | | |
| * (RICS) Royal Institution of Chartered Surveyors membership * Level 7 Certificate in Professional Consulting * Level 7 Diploma in Professional Consulting * (MSc) Building Surveying * APMG Agile Programme Management Foundation | | | |
| **Typical Specification required to be carried out by the consultant** | | | |
| **STAGE 1** | | |  |
| 1.1 | | | Receive an initial brief from the Client Organisation and assist in identifying possible options and expenditure limits. |
| 1.2 | | | Develop and submit to the Client Organisation for approval a Project procurement strategy and, following approval by the Client Organisation, carry out the Services and obligations necessary to achieve the satisfactory completion of the Project at or below the approved cost limit which Services and obligations shall include, but shall not be limited to, the Services and obligations set out in this Annex. |
| 1.3 | | | Assist the Client Organisation to select and procure the site and assess the implications of any constraints attaching to it and report thereon to the Client Organisation. |
| 1.4 | | | Make recommendations to the Client Organisation on the need for any site investigations or tests to be undertaken including any tests to ascertain the presence of contaminated ground and implement any decision taken by the Client Organisation. |
| 1.5 | | | Make recommendations to the Client Organisation on the need to appoint Consultant Disciplines to the Project Team and on the scope of their Services. Subsequently be responsible in all matters leading to their appointment and prepare detailed briefs covering the scope of the Services for which they will be responsible. **The Project Manager is to arrange particular meetings with the Consultant Disciplines to stress the importance of collaborative working and a team ethos, with measurable improvements**. |
| 1.6 | | | Establish contact with Consultant Disciplines following their appointment and establish formal communication procedures and hierarchy of responsibility between them and introduce procedures to ensure that they work closely as a team. |
| 1.7 | | | Following consultation with the Client Organisation, arrange for any necessary surveys to be undertaken. |
| 1.8 | | | Arrange for the Consultant Disciplines to undertake preliminary feasibility studies based on the Client Organisation Initial Brief and if these studies highlight the need to amend that brief, discuss with the Client Organisation and obtain instructions. |
| 1.9 | | | Co-ordinate the views of the Consultant Disciplines in order to submit a detailed report to the Client Organisation on the recommended scope of the Services together with a recommended programme and anticipated costs, the report to include reviewing alternative design and construction solutions together with estimates of cost of those options and provide assistance to the Client Organisation in selecting the preferred option and in formulating the Design Brief. |
| 1.10 | | | Contractor the final Design Brief with the Client Organisation which shall include a detailed programme for completion of the Project and an agreed cost limit. |
| 1.11 | | | Communicate the details of the agreed Design Brief to all Consultant Disciplines and ensure that each Discipline contractor in writing their commitment to that brief. If this highlights the possibility of difficulty in implementing the brief, take the necessary action to resolve such difficulties and, if this proves to be impossible, report to the Client Organisation making recommendations. |
| 1.12 | | Where there is duplication between the Services provided under the terms of this Appointment and the Services of another consultant commissioned in connection with this Project through other framework agreements, resolve the duplicated Services by agreement with the Consultant concerned, contractor the matters agreed in writing and obtain the agreement of the Client Organisation. | |
| 1.13 | | Assess the need to take action to protect the interests of the Client Organisation in respect of neighbouring properties and accordingly make recommendations to the Client Organisation. | |
| 1.14 | | Undertake risk assessments. | |
| 1.15 | | Undertake value management exercises. | |
| 1.16 | | Obtain the Client Organisation’s approval to proceed to Stage 2. | |
| **STAGE 2** | |  | |
| 2.1 | | Ensure that a cost plan is prepared for the project based on the approved cost limit and ensure that copies of the cost plan are given to all Consultant Disciplines and that they contractor their agreement to the content applying to their own discipline. | |
| 2.2 | | Submit to the Client Organisation a projected cash flow based on the approved cost limit for the Project and the anticipated programme and update as necessary until completion of the Services keeping the Client Organisation informed at all times of any changes. | |
| 2.3 | | In co-operation with the other members of the Project Team prepare a detailed programme for the production of design information leading up to obtaining tenders for the Services and obtain the Consultant Disciplines commitment to that programme in writing. | |
| 2.4 | | Establish rigorous cost control procedures and ensure that designs are strictly monitored against the agreed cost plan and that any difficulties are rectified, and the approved cost limit is maintained. | |
| 2.5 | | Establish rigorous management procedures to monitor the production of design information produced by the members of the Project Team in order that any shortcomings are immediately highlighted and rectified and continue to implement the monitoring procedure until completion of the Project. Where difficulties are encountered, which cannot be satisfactorily resolved, inform the Client Organisation of those difficulties and make recommendations. | |
| 2.6 | | Establish and chair regular meetings with the other members of the Project Team and others in order to monitor progress and to highlight any shortfall in design information and take any action necessary to correct any deficiencies. Circulate minutes of the meetings to the Client Organisation and to the members of the Project Team. The minutes shall record the action taken to rectify any deficiencies and shall indicate who is to be responsible for taking that action. | |
| 2.7 | | Establish regular reporting procedures with the Client Organisation, identify those matters which require Client Organisation approval and introduce procedures to obtain those approvals. | |
| 2.8 | | In conjunction with other members of the Project Team, make recommendations to the Client Organisation on the need for specialist design consultants outside of the Consultants Core Service Disciplines. | |
| 2.9 | | In conjunction with the other members of the Project Team, make recommendations to the Client Organisation on the need for specialist contractors to design and execute any sections of the Services or for specialist suppliers to provide any materials or equipment and obtain the Client Organisation’s approval and take any action necessary to implement the Client Organisation decision. | |
| 2.10 | | Co-ordinate the production of all design work, ensure that the designs are fully integrated and are tested throughout the design phase against cost targets and that the designs fully comply with all Statutory requirements or Regulations including, but not confined to requirements concerning Health and Safety, Planning, Fire, Building Control etc., and take any action necessary to rectify deficiencies. | |
| 2.11 | | At monthly intervals, submit a written report to the Client Organisation showing the progress made against the agreed design programme and the present estimated cost of the Project relative to the approved cost limit and, if required by the Client Organisation, arrange to meet the Client Organisation in order to discuss the content of the report and to receive instructions. | |
| 2.12 | | Agree materials and construction specifications with the Consultant Disciplines and keep the Client Organisation fully informed. | |
| 2.13 | | Ensure that statutory approvals for the Project are obtained and that all utilities and other necessary services are in place both for the construction phase and for permanent operation following completion of the Project and, where action by the Client Organisation is necessary, assist the Client Organisation to take that action. | |
| 2.14 | | Give the Client Organisation sufficient notice of all approvals, decisions or other matters which require action by the Client Organisation and, where appropriate, assist the Client Organisation by providing information and by making recommendations. | |
| 2.15 | | Where difficulties are highlighted during the design phase which may not be capable of being resolved and which may result in a failure to meet the Client Organisation’s brief, submit a report to the Client Organisation giving recommendations and options. | |
| 2.16 | | Ensure that all notices required under EC regulations are given at the proper time and that all procedures comply with EC legislation. | |
| 2.17 | | Ensure that life cycle costings and environmental assessment techniques are applied to the development of Consultants designs and adopt solutions giving the best overall value for money and, where this may result in the cost limit for the project being exceeded, make recommendations to the Client Organisation and obtain instructions. | |
| 2.18 | | Make recommendations to the Client Organisation on the preferred method of procuring the construction and completion of the Services and obtain the Client Organisation’s instructions. | |
| 2.19 | | Arrange for any required submissions of designs, drawings, models, calculations or other material to regulatory bodies and expedite any necessary approvals. | |
| 2.20 | | Act as witness at any hearing or planning enquiry and the like (subject to the agreement of an additional fee). | |
| 2.21 | | Ensure that all drawings, specifications, schedules, bills of quantities or other documents necessary for the obtaining of tenders are completed and are fully coordinated, are in accordance with the brief approved by the Client Organisation and are available on the programmed date. | |
| 2.22 | | Discuss with the Client Organisation the general arrangements for obtaining tenders and implement the action approved. | |
| 2.23 | | In co-operation with the other members of the Project Team submit to the Client Organisation the names of contractors who are considered to be suitable to be invited to tender for the Services and specialist Services and obtain the Client Organisation’s instructions. | |
| 2.24 | | Ensure that a pre-tender estimate is prepared based on the tender documentation and check against the cost target for the Project approved by the Client Organisation and report to the Client Organisation accordingly. | |
| 2.25 | | Undertake risk assessments. | |
| 2.26 | | Undertake value management exercises. | |
| 2.27 | | Ensure that tenders are invited on the programmed date and in accordance with the Client Organisation’s instructions and arrange for tenders to be returned direct to the Client Organisation in accordance with the Client Organisation's procedure. | |
| 2.28 | | Accompany tendering contractors or sub-contractors or the representative of the Client Organisation or occupying Department to the site of any Services being undertaken in connection with this Appointment. | |
| 2.29 | | Ensure that all enquiries from contractors during the tendering period are answered satisfactorily and ensure that any clarification on the content of the documentation given to a tenderer is copies to other contractors tendering. | |
| 2.30 | | Copy to the Client Organisation all correspondence concerning the obtaining of tenders. | |
| 2.31 | | Where full time site inspection staff are to be appointed, ensure that arrangements are made in good time to implement that instruction. | |
| 2.32 | | Co-ordinate tender appraisals from the other members of the Project Team and submit a report to the Client Organisation with recommendations. If the lowest tender obtained is higher than the approved cost for the Services, obtain whatever advice is necessary from other consultants in order to make recommendations to the Client Organisation and arrange to implement the Client Organisation’s instructions. | |
| 2.33 | | Arrange for any tender under consideration for acceptance to receive an arithmetical and technical check and ensure that any errors are resolved in accordance with the Client Organisation’s procedure. | |
| 2.34 | | Obtain the Client Organisation’s decision regarding the acceptance of a tender or tenders and implement the Client Organisation’s instructions. | |
| 2.35 | | Arrange for unsuccessful tenderers to be notified. | |
| 2.36 | | Obtain the Client Organisation’s approval to proceed to Stage 3. | |
| **STAGE 3** | |  | |
| 3.1 | | Co-ordinate the collection of documents from the other members of the Project Team to enable the Client Organisation to enter into contract with the contractor(s) and ensure that any adjustments have been made to the documents in order that they conform to the approval given by the Client Organisation. | |
| 3.2 | | Ensure that the site will be available to the Contractor on the programmed date and in the event of any difficulty, keep the Client Organisation fully informed. | |
| 3.3 | | Undertake risk assessments. | |
| 3.4 | | Undertake value management exercises. | |
| 3.5 | | Ensure that the Client Organisation has accepted the selected Contractor's tender and that the Client Organisation approves that the matters referred to in Construction to Practical Completion can proceed | |
| 3.6 | | Administer the terms of the construction contract whilst the Project is under construction, undertaking the full range of duties imposed on the Project Manager by the Services contract in accordance with the timescales therein. | |
| 3.7 | | Agree a detailed programme for the Services with the Contractor which specifies completion by the agreed date. | |
| 3.8 | | Agree a date with the Contractor and the Client Organisation for the commencement of work on site. | |
| 3.9 | | Establish and chair regular meetings with the Contractor and Consultant Disciplines as necessary in order to monitor the progress of the Services and the production of design information to the Contractor and circulate minutes of the meeting to the Client Organisation and to others. The minutes shall record the action to be taken to rectify any deficiencies and shall indicate who is to be responsible for taking that action. Inform the Client Organisation if any delay in the production of design information cannot be resolved in time to prevent a delay to the Services. | |
| 3.10 | | Until completion of the Project, continue reporting to the Client Organisation in accordance with 2.11. | |
| 3.11 | | Ensure that rigorous safety policies are in place and are implemented by the Contractor and Sub-Contractors working on the site and that there is adequate protection for the public and others. | |
| 3.12 | | Ensure that rigorous quality management procedures are in place throughout the construction phase. | |
| 3.13 | | Arrange for any special inspections or tests necessary to ensure that proper and adequate standards of construction are maintained and that all Services are constructed in accordance with the contract documents. | |
| 3.14 | | Throughout the construction phase and until all construction accounts are settled, inform the Client Organisation of any contractual claims which have been received or are likely to arise. Make recommendations to the Client Organisation and implement the Client Organisation’s instructions. | |
| 3.15 | | Continue to monitor the construction phase and take any necessary action in order to ensure that the Project will be completed within the cost approved by the Client Organisation and by the programmed completion date. When matters arise, which effect the contract completion date or the approved cost, keep the Client Organisation fully informed. | |
| 3.16 | | Ensure that adequate records are maintained, and photographs of the Services are taken throughout the construction phase recording progress of the Services and, particularly, highlighting any delays including those resulting from interaction between Contractors or Sub-Contractors working on the site. | |
| 3.17 | | Keep accurate records of all payments and other matters relating to the service provided under this Appointment and retain all vouchers and invoices and, if requested, make these available to the Client Organisation. | |
| 3.18 | | Ensure that Consultant Disciplines observe the provisions of their Appointment regarding cost control procedures and the procedures for obtaining the Client Organisation approval to introduce variations. On behalf of the Client Organisation, receive the, Consultants financial statements and submissions in accordance with this Condition and submit to the Client Organisation with recommendations. | |
| 3.19 | | Ensure that Certificates are issued in accordance with the terms of the contract. | |
| 3.20 | | Co-ordinate site visits of Consultant Disciplines and ensure that the frequency of those visits is satisfactory. | |
| 3.21 | | Arrange for any necessary spare equipment, 'as built' record drawings, maintenance manuals and general guidance on the operation of the Building and Services to be made available in good time in order that they can be provided to the Client Organisation on completion of the Project. | |
| 3.22 | | Inform the Client Organisation four weeks prior to the anticipated date of completion of the Services. | |
| 3.23 | | Co-ordinate the preparation and issue of Certificates relating to the completion of the Services. | |
| 3.24 | | Ensure that lists of defects are issued at the appropriate time under the Services contract. | |
| **STAGE 4** |  | | |
| 4.1 | Advise the Client Organisation on the resources and skills required to operate and maintain the completed Services and make recommendations on the timing of their appointment or on the need for any maintenance agreements. | | |
| 4.2 | Ensure that all defects are rectified. | | |
| 4.3 | Ensure that the Services are cleaned, tested and commissioned prior to handover to the Client Organisation. | | |
| 4.4 | Ensure that all statutory Certificates and Approvals are given to the Client Organisation. | | |
| 4.5 | Ensure that an appropriate Certificate is issued to the Contractor when all defects have been made good. | | |
| 4.6 | Make recommendations to the Client Organisation regarding any outstanding claims, counterclaims, liquidated damages or other contractual issues and receive and implement the Client Organisation’s instructions. | | |
| 4.7 | Co-ordinate the production of Final Accounts and the issue of Final Certificates and, accordingly, make recommendations to the Client Organisation. | | |
| 4.8 | Prepare a completion report to the Client Organisation showing:  - a comparison between the out-turn cost and the approved budget cost;  - the actual expenditure against sums includes in the contract for specialist Services and provisionally measured work;  - the costs included against any Variation of Price Condition;  - the expenditure against approved variations and additional Services authorised by the Client Organisation;  - a comparison of programme dates against actual dates achieved;  - any lessons obtained from the scheme which could be applied to future Projects;  - the performance of Project participants. | | |
| 4.9 | Assist the Client Organisation is dealing with any outstanding insurance claims. | | |

**Lot 5 – Building Surveying**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * Licentiate APC * (MSc) Building Surveying * AssocRICS, MRICS or FRICS Royal Institution of Chartered Surveyors Membership | |
| **Typical Specification required to be carried out by the consultant** | |
| **STAGE** 1 |  |
| 1.1 | Carry out a survey and submit a report to the Client Organisation The report to include:   * a description and address of the property; * the dates during which the survey was undertaken; * the name and qualification of the person who carried out the survey; * details of the condition of the building services disclosed by the survey; * the results of any tests which were undertaken; * whether any further investigations or tests are advised; * supporting drawings and/or photographs; * recommendations (and estimated costs, if applicable); * an anticipated programme for the completion of the Services; * the name and qualification of the person signing the report who should be a * Partner or Director of the Consultant. |
| 1.2 | Obtain an initial brief from the Client Organisation including the timescale for the Project and the financial limits. |
| 1.3 | Contact other Consultant Disciplines on the Project Team and ensure that the Services listed hereunder are fully coordinated with the Services provided by those Consultants. |
| 1.4 | Visit the site and identify surveys required. Arrange for the carrying out of any investigations authorised by the Client Organisation, interpret the results and, if necessary, make recommendations to the Client Organisation. |
| 1.5 | Investigate the various alternatives in order to select the most suitable solution and prepare outline drawings and specifications to illustrate the proposals. |
| 1.6 | Undertake value management exercises. |
| 1.7 | Undertake risk assessments. |
| 1.8 | Obtain the Client Organisation’s approval to proceed to Stage 2. |
| **STAGE 2** |  |
| 2.1 | In co-operation with the other members of the Project Team, undertake such studies as may be necessary in order to submit proposals on the building services together with options and recommendations to the Client Organisation including an anticipated programme and installation and operational costs and undertake all further work necessary to obtain the Client Organisation’s approval to proceed on the basis of the agreed proposals. |
| 2.2 | Develop the building services design within the approved cost and submit to the Client Organisation for approval. |
| 2.3 | Where applicable, co-operate with the other members of the Project Team in the preparation of a cost plan for the Project based on the overall cost approved by the Client Organisation. |
| 2.4 | Ensure that the building services design is fully integrated with the overall design of the Project and that the Services can be completed within the amount allocated for building services in any overall cost plan and within the programmed time. |
| 2.5 | Identify major items of plant and equipment necessary for the Services and undertake investigations as to their technical suitability and availability. |
| 2.6 | To the extent considered necessary, and following consultation with, and approval by the Client Organisation, invite pre-tender quotations for plant and equipment. |
| 2.7 | If necessary, advise the Client Organisation of the need to appoint specialist contractors to supply equipment or to design and execute sections of the Services and obtain the Client Organisation's approval to approach the contractors concerned. |
| 2.8 | Monitor the development of the scheme design against the approved cost and report any anticipated difficulty to the Client Organisation including proposals for overcoming that difficulty and obtain the Client Organisation’s instructions in sufficient time to allow corrective action to be taken. |
| 2.9 | Where the Client Organisation has indicated the possibility of a change to the agreed brief during the design phase, inform the Client Organisation of the cost and programme implications and obtain the Client Organisation’s instructions. |
| 2.10 | Make recommendations to the Client Organisation on the pre-ordering of items of plant and equipment, obtain instructions accordingly. |
| 2.11 | Attend all design team meetings, report on the matters appertaining to the building services design and provide advice thereon to other Consultant Disciplines as may be necessary. |
| 2.12 | Complete the design of the building services up to tender stage and provide all information necessary for the completion of the tender documents. |
| 2.13 | Ensure that life cycle costings and environmental assessment techniques are applied to the Project and adopt solutions giving the best overall value for money and, where this may result in the cost limit for the Services being exceeded, make recommendations to the Client Organisation and obtain instructions. |
| 2.14 | With the other members of the Project Team, consider the most suitable options for the procurement of the Services, make recommendations to the Client Organisation and obtain instructions. |
| 2.15 | With the other members of the Project Team, make recommendations to the Client Organisation on the suitability of contractors who may be invited to submit tenders for the Services and any specialist Services and obtain instructions. |
| 2.16 | Ensure that all drawings, specifications, schedules, or other documents necessary for the placing of the contract are completed and are fully coordinated, are in accordance with the brief approved by the Client Organisation and are available on the programmed date. |
| 2.17 | Prepare such details relating to the Services as may be required for submission to any appropriate authority and obtain any necessary approvals. |
| 2.18 | Ensure that a pre-tender cost check on the design of the building services is prepared based on the tender documentation and inform the Client Organisation of the result of that check. |
| 2.19 | Discuss with the Client Organisation the need for site inspection staff and obtain instructions. |

**Lot 6 - Building Services Engineering**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * (BEng) Bachelor’s in Engineering * (CIBSE) Chartered Institute of Building Services Engineering membership * (IMechE) Institution of Mechanical Engineering * Edexcel Level 4 NVQ Diploma in Construction and Building Services Management and Supervision (Sustainability) (L4) | |
| **Typical Specification required to be carried out by the consultant** | |
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| **GENERAL** | The mechanical and electrical engineer (also known as the building services engineer) shall provide the following services set out below.  Coordinate and monitor the services provided by other consultants which relates to the mechanical and electrical engineering aspects of the work and advise the Client Organisation generally.  Coordinate any design work carried out by any consultant, specialist contractor, sub-contractor and/or supplier where that work relates to the mechanical and electrical engineering aspects of the work.  Where appropriate and necessary consult and liaise with other consultants in connection with any architectural treatment of the mechanical and electrical engineering aspects of the Services.  The mechanical and electrical engineer should ensure that value for money is achieved in two key ways:   * Working with the lead designer to deliver the best possible detailed designs and full planning application from the agreed budget for the multi-disciplinary team * Working with the lead designer to develop a detailed design that will result in a development that secures the maximum possible set of benefits   Where required, the mechanical and electrical engineer should attend the regular progress meetings that will be held between the architect and the Client Organisation. |
| **STAGE 1** |  |
| 1.1 | Visit the site and study data and information relating to the project and relevant to the work which are reasonably accessible to the consultant and consider reports that have been prepared. |
| 1.2 | Obtain such information as is reasonably available from documents on the existence and extent of public services such as water, gas, electricity, sewerage, culverts, tunnels and telecommunications services and comment to the lead consultant on any effect that these may have on the Services, both during construction and on completion. |
| 1.3 | Advise the Client Organisation on the need for arrangements to be made for and define the extent of topographical and dimensional surveys of the site, surveys to obtain details of construction in existence or adjacent to the site, special investigations or model tests. Arrange as agent for the Client Organisation when authorised by the client for such Services to be undertaken, certify the amount of any payments to be made by the Client Organisation to the persons or firms carrying out such investigations, and advise the Client Organisation on the results of such investigations. |
| 1.4 | Comment to the Client Organisation on physical site restrictions which may affect the engineering options for the Services. |
| 1.5 | Collaborate with the Lead Consultant and any other consultants in seeking from the client any further information needed so that they can perform their agreed services. |
| 1.6 | Collaborate with the Lead Consultant and any other consultants in making initial recommendations on the technical viability of the Services. |
| **STAGE 2** |  |
| 2.1 | Consult any local or other authorities about matters of principle in connection with the design of the Services. |
| 2.2 | Consider alternative outline solutions for the Services and in connection with providing a feasibility study. |
| 2.3 | Provide sufficient preliminary information in relation to the Services in the form of advice, sketches, reports or outline specifications to enable the Lead Consultant to prepare his outline proposals and assist any other consultant to prepare the outline cost plan. |
| 2.4 | The preliminary information should be provided within sufficient time to allow the architect to produce the finalised concept design. |
| 2.5 | Provide an approximation at current prices of the overall cost of meeting the Client Organisation’s requirements for the Services based upon unit volume, unit area or similar available statistics. |
| **STAGE 3** |  |
| 3.1 | Develop the design of the detailed proposals for the Services in collaboration with the Lead Consultant and any other consultants. |
| 3.2 | Negotiate with public and other utility authorities for provision of necessary incoming services |
| 3.3 | Prepare such representative sketches, drawings and specifications and/or calculations in respect of the Services as are necessary to prepare the cost plan. |
| 3.4 | Provide by way of sketch drawings or schedules the structural planning requirements for the engineering services showing locations and approximate sizes of plant rooms, major ducts and service runs and provide the approximate weight of any item affecting the structural design. |
| 3.5 | Assess and prepare preliminary schedules of power, heating and cooling loads as applicable. |
| 3.6 | Receive from the Lead Consultant, the thermal performance standards for the facades and roofs of buildings and details of any external shading/solar control. Analyse the preliminary heat gains and losses for the purpose of initial sizing of heating, ventilation and air conditioning systems and plant, as applicable. |
| 3.7 | Prepare and submit drawings in sufficient detail to enable the contractor to interpret the design information correctly and to submit tenders for a design and build contract. |
| **STAGE 4** |  |
| 4.1 | Develop the design of the Services in collaboration with the Lead Consultant and any other consultants and prepare sufficient calculations, schematic drawings, schedules and specifications to enable the architect or any other consultant to prepare the final proposals. |
| 4.2 | Assist the lead consultant in coordinating the design of the Services into the overall design. |
| 4.3 | Provide builders work information sufficient to allow development of the structural design and preparation of bills of quantities by any other consultant. |
| 4.4 | Prepare a revised cost approximation of the Services. |
| 4.5 | Integrate into the design of the Services any requirements of specialist sub-consultants, contractors or sub-contractors. |
| 4.6 | Collaborate with the Lead Consultant and any other consultant to prepare the final proposals for presentation to the client, drawing attention to any significant differences from the previously agreed requirements for the Services. |
| 4.7 | Prepare pre-tender documents and drawings as necessary. Invite quotations for equipment, report upon offers received and select equipment. |
| 4.8 | Prepare such calculations and details but not work in connection with building regulations relating to the work as may be required for submission to any statutory authority including the coordination of such information for Services submitted by other consultants, specialist suppliers, contractors and/or sub-contractors, as is available which may need to be included in such submissions excluding any submissions or applications for planning consent or approval. |
| 4.9 | Prepare detailed designs drawings for the Services and prepare specifications for the Services. |
| 4.10 | Advise the Lead Consultant on the need for any special conditions of contract relevant to the Services or on appropriate forms of contract and invitations to tender for Services. |
| 4.11 | Advise on the suitability of persons and firms to be invited to tender for any contract involving the construction, supply and/or installation of all/part of the Services. |
| 4.12 | Assist the Lead Consultant to assemble the tender documentation. |
| 4.13 | Assist the Lead Consultant as to the relative merits of tenders, prices and estimates received for execution of all or parts of the Services. |

**Lot 7 – Architectural Design**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * BSc (Hons) Architecture * (RIBA) Royal Institute of British Architects and the Architects membership * (ARB) Architects Registration Board membership | |
| **Typical Specification required to be carried out by the consultant** | |
| **STAGE 1** |  |
| 1.1 | Carry out a survey of inspection and submit a report to the Client Organisation. The report to  include:   * a description and address of the property; * the dates during which the survey was undertaken; * the name and qualification of the person who carried out the survey; * advice on matters relating to Statutory and legal requirements including rights of * light, rights of support to rights of way and the like; * details of its present condition disclosed by the survey; * whether any further investigation is advised; * supporting drawings and/or photographs; * recommendations (and estimated costs if applicable); * an anticipated programme for the completion of the Services; * the name and qualification of the person signing the report who should be a * Partner or Director of the Consultant. |
| 1.2 | Receive an initial brief from the Client Organisation and assist in identifying possible options and expenditure limits. |
| 1.3 | Carry out an inspection of the site and subsequently consult as necessary with any local or other authority on matters relating to the proposed Services. |
| 1.4 | Arrange for the carrying out of any site investigation authorised by the Client Organisation, interpret the result and, if necessary, make recommendations to the Client Organisation. |
| 1.5 | Arrange with other members of the Project Team to undertake preliminary feasibility studies based on the Client Organisation initial brief, discuss with the Client Organisation and obtain instructions. |
| 1.6 | Liaise with the other members of the Project Team and undertake such further studies as may be necessary in order to submit proposals and options to the Client Organisation including an anticipated programme and costs and undertake all work necessary to obtain the Client Organisation approval to proceed on the basis of the Client Organisation approved Design Brief. |
| 1.7 | Undertake risk assessments. |
| 1.8 | Undertake value management exercises. |
| 1.9 | Obtain the Client Organisation approval to proceed to Stage 2. |
| **STAGE 2** |  |
| 2.1 | In co-operation with other members of the Project Team, develop outline proposals and submit to the Client Organisation including review of programme and costs. Incorporate advice on energy conservation and energy targets. Undertake all work necessary to obtain the Client Organisation approval. |
| 2.2 | In co-operation with the other members of the Project Team, develop a scheme design within the approved cost and submit to the Client Organisation for approval giving details of proposed specification and Services. |
| 2.3 | Make recommendations to the Client Organisation on the need for specialist contractors to design and execute any sections of the Services or for specialist suppliers to provide any materials or equipment and obtain the Client Organisation approval and take any action necessary to implement the Client Organisation decision. |
| 2.4 | In liaison with the other members of the Project Team assist in the preparation of a cost plan based on the approved cost and the anticipated start and completion dates and, thereafter, monitor the development of the scheme design against the cost plan and report any anticipated difficulty to the Client Organisation including proposals for overcoming that difficulty and obtain the Client Organisation instructions in sufficient time to allow corrective action to be taken. |
| 2.5 | Ensure that the designs for the Services fully comply with all Statutory Requirements or Regulations including, but not confined to requirements concerning Health and Safety, Planning, Fire, Building Control, etc., and take any action necessary to rectify deficiencies. |
| 2.6 | Make all necessary submissions to Statutory Authorities and obtain approvals. |
| 2.7 | Where necessary act as a witness at any hearing or planning enquiry or the like. |
| 2.8 | Where the Client Organisation has indicated the possibility of a change to the agreed brief during the design phase, inform the Client Organisation of the cost and programme implications and obtain the Client Organisation instructions. |
| 2.9 | Ensure that life cycle costings and environmental assessment techniques are applied to the design for the Project and adopt solutions giving the best overall value for money and, where this may result in the cost limit for the project being exceeded, make recommendations to the Client Organisation and obtain instructions. |
| 2.10 | Ensure that the specifications prepared for the Services specifically exclude the use of materials accepted as being deleterious at the time and subsequently ensure that such materials are not used in connection with the Services. |
| 2.11 | In co-operation with the other members of the Project Team, complete the design of the Project up to tender stage. |
| 2.12 | Discuss with the Client Organisation the need for site inspection staff and obtain instructions. |
| 2.13 | Consider the most suitable options for the procurement of the Services and, following discussion with the other members of the Project Team, make recommendations to the Client Organisation and obtain instructions. |
| 2.14 | In liaison with the other members of the Project Team, make recommendations to the Client Organisation on the suitability of contractors who may be invited to submit a tender for the main Services and any specialist Services and obtain instructions. |
| 2.15 | In liaison with the other members of the Project Team, ensure that all drawings, specifications, schedules, bills of quantities or other documents necessary for the placing of contracts are completed and are fully coordinated, are in accordance with the brief approved by the Client Organisation and are available on the programmed date. |
| 2.16 | Ensure that a pre-tender cost check is prepared based on the tender documentation and inform the Client Organisation of the result of that check. |
| 2.17 | Agree with the Client Organisation final arrangements for the obtaining of tenders. |
| 2.18 | Undertake risk assessments. |
| 2.19 | Undertake value management exercises. |
| 2.20 | In liaison with other members of the Project Team, invite tenders from contractors included on the list approved by the Client Organisation and arrange for tenders to be returned direct to the Client Organisation in accordance with the Client Organisation tendering procedures. |
| 2.21 | Copy all correspondence regarding the obtaining of tenders direct to the Client Organisation. |
| 2.22 | Examine tenders received and, in liaison with other members of the Project Team, make recommendations to the Client Organisation and advise on any corrective action which may be required if the lowest tender is higher than the approved cost for the Services and obtain the Client Organisation instructions. |
| 2.23 | Ensure that any tender under consideration for acceptance has received an arithmetical and technical check and that any errors have been resolved in accordance with the Client Organisation procedure. |
| 2.24 | Obtain the Client Organisation instructions regarding the acceptance of a tender. |
| 2.25 | Obtain the Client Organisation approval to proceed to Stage 3. |
| **STAGE 3** |  |
| 3.1 | In liaison with the other members of the Project Team, provide the Client Organisation with drawings or other documents necessary for entering into contract. |
| 3.2 | Undertake risk assessments. |
| 3.3 | Undertake value management exercises. |
| 3.4 | Ensure that the Client Organisation has accepted the selected Contractor's tender and that the Client Organisation approves that the matters referred to in Construction to Practical Completion can proceed. |
| 3.5 | In collaboration with the other members of the Project Team, assist the Project Manager in administering the terms of the Services contract during operations on site and relating to the completion of the Services. |
| 3.6 | Until completion of the project, report to the Project Manager at monthly intervals on the progress of the Services. |
| 3.7 | Ensure that rigorous safety policies are in place and are implemented by the  Contractor and sub-contractors working on the site and that there is adequate protection for the public and others and that Health and Safety Statutory requirements or regulations are fully observed. |
| 3.8 | Ensure that rigorous quality management procedures are in place throughout the construction phase. |
| 3.9 | Attend the regular meetings with the Contractor and the other members of the Project Team as necessary in order to monitor the progress of the Services and the production of design information to the Contractor. |
| 3.10 | Visit the site at regular intervals during the construction of the Services in order to inspect the quality of the work and to monitor progress and ensure that the Services are completed fully in accordance with the contract documents. |
| 3.11 | Inform the Project Manager of any contractual difficulties which may arise during the course of the contract and obtain the Project Manager's instructions. |
| 3.12 | In liaison with the other members of the Project Team, establish post contract cost control procedures in order to ensure financial control covering the issue of instructions which vary the Services and the issue of cost reports to the Project Manager. |
| 3.13 | Liaise as necessary with the other members of the Project Team and issue interim payment certificates in accordance with the terms of the construction contract. |
| 3.14 | Inform the Project Manager four weeks prior to the anticipated date of completion of the Services. |
| 3.15 | Issue Certificates relating to the completion of the Services |
| **STAGE 4** |  |
| 4.1 | In liaison with the other members of the Project Team, provide the Client Organisation with a set of record drawings and guidance on the operation and maintenance of the Project and its services. |
| 4.2 | Issue a list of defects to the Contractor at the appropriate time in accordance with the terms of the Services contract. |
| 4.3 | Ensure that the Contractor rectifies the defects within a reasonable time and issue a Certificate to the Contractor when all defects have been made good. |
| 4.4 | Liaise with the other members of the Project Team regarding final valuation of the Services and report the final cost of the Services to the Client Organisation. |
| 4.5 | Liaise with other members of the Project Team and issue the Final Certificate. |

**Lot 8 - Landscape Architecture**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * BSc (Hons) Architecture * Landscape Architecture MA * L.A.R.E certified Landscape Architect Registration Exam | |
| **Typical Specification required to be carried out by the consultant** | |
| **STAGE 1** |  |
| 1.1 | Obtain from the Client Organisation information on ownership, legal interests, site information and any other matters which may influence the development or landscape management requirements of the project. |
| 1.2 | Assist the Client Organisation to define the initial project requirements. |
| 1.3 | Visit the site and carry out an initial site appraisal and report findings to the Client Organisation. |
| 1.4 | Agree the project scope, the brief, programme, finance, consultations and key stakeholders. |
| 1.5 | Agree the scope of services to be provided by the Landscape Consultant and other consultants, the fee basis for the services and the design programme. Agree the design responsibility matrix. |
| 1.6 | Establish the stakeholder consultation/community communication process and methodology. Establish means by which information can be fed into the master planning design or landscape design process. |
| 1.7 | Agree the level and extent of BIM compliance required including 4D (time), 5D (cost) and 6D (FM). Define BIM Inputs and Outputs in relation to the Employers Information Requirements (EIR) documents. |
| 1.8 | Advise the Client Organisation of their duties under the Construction (Design and Management) Regulations 2015 and carry out the duties of a Designer as defined in the Regulations. |
| 1.9 | Arrange for topographical or other surveys to be obtained. |
| 1.10 | Prepare context, site or townscape appraisals (as appropriate) with written advice and recommendations to determine the feasibility of the Client Organisation's requirements. |
| 1.11 | Provide alternative solutions for review with the Client Organisation, including their technical and financial implications. |
| 1.12 | Advise on the need to obtain planning permissions and other statutory requirements. |
| 1.13 | Contribute to the development of the final design brief from the Client Organisation’s initial project requirements. |
| 1.14 | Identify procurement methods, project quality plan and procedures, BIM procedures, risk programme, organisational structures and engagement of other consultants and specialists for the project. |
| 1.15 | Obtain the Client Organisation approval to proceed to Stage 2. |
| **STAGE 2** |  |
| 2.1 | Agree final amendments to the project and design brief and confirm the design intentions, procurement method and Agreement of Project Quality Plan including BIM and Change Control protocols. |
| 2.2 | Develop concept design proposal options and co-ordinate information with other project team members. |
| 2.3 | Desktop study: collate physical background information including land use, ownerships, designations, planning context, geology, soil, topography, vegetation, drainage, utilities; collate historical, heritage, cultural and social aspects including any past consultation data. |
| 2.4 | Site survey and visual analysis: analyse existing landscape/townscape; determine viewpoints, road alignments, pedestrian desire lines and routes, building fabric and materials, soft landscape infrastructure, hard landscape infrastructure and existing architecture. |
| 2.5 | Prepare initial outline specifications and provide information for approximate estimate of construction costs by others. |
| 2.6 | Provide input into sustainability / BIM / environmental / maintenance and operational / health and safety / risk strategies. |
| 2.7 | Attend design team meetings or presentation meetings. |
| 2.8 | Develop the concept proposals indicating spatial arrangements, construction materials and appearance and BIM data. |
| 2.9 | Prepare outline specifications and schedules of materials and maintenance. |
| 2.10 | Consult with statutory authorities. |
| 2.11 | Provide developed detailed information for preparation of estimate of construction costs by others. |
| 2.12 | Liaise and co-ordinate with other project team members as required. |
| 2.13 | Attend Serviceshops for review of requirements for BREEAM / EcoHomes / Code for Sustainable Homes / BIM / risk or health and safety assessments. |
| 2.14 | Review and amend proposals to accommodate the requirements for BREEAM / EcoHomes / Code for Sustainable Homes / BIM/ risk or health and safety assessments. |
| 2.15 | Make detailed applications for statutory approvals. |
| 2.16 | Develop detailed proposals to technical design stage for materials, techniques and standards of workmanship. Allow for integration of BIM Data. |
| 2.17 | Prepare design briefs, codes, policies and guidelines. |
| 2.18 | Provide detailed proposals for updating the costs and check alignment with cost budget. |
| 2.19 | Review and address conditions attached to planning consent. |
| 2.20 | Prepare all production drawings, schedules and specification of materials and workmanship required for the construction of the work. |
| 2.21 | Provide information for updating estimate of construction costs by others. |
| 2.22 | Review other consultants’/specialists’ design and co-ordinate as part of production information. |
| 2.23 | Development of BIM data in sufficient detail to include co-ordination of design team inputs, enable a tender or tenders to be obtained. |
| 2.24 | Provide information for preparation of pricing documents / bills of quantities by others in sufficient detail for tender purposes. |
| 2.25 | Provide advice on suitable landscape Contractors to enable a final list of approved tenderers to be prepared. |
| 2.26 | Prepare and collate all information and invite tenders from approved Contractors. |
| 2.27 | Provide information for tender issue. |
| 2.28 | Assist with or appraise and advise on tenders submitted. |
| 2.29 | Review and amend proposals to accommodate the requirements of value engineering. |
| 2.30 | Review of BIM information provided by contractors and specialists, including integration into project BIM data to agreed level. |
| **STAGE 3** |  |
| 3.1 | Advise the Client Organisation on the appointment of the Contractor and on the responsibilities of the Client Organisation, the Contractor and the Landscape Consultant under the terms of the contract document; prepare the contract and arrange for it to be signed by the Client Organisation and the Contractor. |
| 3.2 | Provide contract information as required by the form of contract. |
| 3.3 | Administer the contract during construction including reviewing the Contractor’s programme; chairing progress meetings; issuing information and instructions; checking and certifying progress; checking and certifying accounts for payments due; providing financial reports to the Client Organisation with other consultants where appointed; identifying any variation in the cost of the Services and any adjustment to the completion date.. |
| 3.4 | Attend progress meetings to an agreed schedule. |
| 3.5 | Visit the site at intervals appropriate to the Contractor's programmed activities and/or to an inspection schedule agreed with the Client Organisation to inspect the progress and quality of the Services and compliance with the construction information. Provide inspection reports to the Client Organisation. |
| 3.6 | Liaise with other appointed consultants to enable decisions to be made regarding the contract Services. |
| 3.7 | Provide information for change control procedures, or to assist in decision making on cost and time control during the construction period. |
| 3.8 | Provide record information to the Principal Designer / Principal Contractor. |
| **STAGE 4** |  |
| 4.1 | Visit the site at intervals appropriate to the Contractor's programmed establishment activities and to a schedule agreed with the Client Organisation to inspect the progress and quality of the Services. |
| 4.2 | Prepare the schedule of defects and certify completion of defects made good. |
| 4.3 | Administer the terms of the contract relating to the completion of the Services. |

**Lot 9 - Site Supervisor / Clerk of Services**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * SSSTS Course CITB Accredited * (SEATS) Site Environmental Awareness Training Scheme * (SMSTS) Site Management Safety Training Scheme * (HSA) Health and Safety Awareness | |
| **Typical Specification required to be carried out by the consultant** | |
| **STAGE 1** |  |
| 1.1 | Make at least weekly visits to the projects in contract, attending the site meetings and advising of difficulties being encountered or likely to be encountered. |
| 1.2 | Make recommendations both orally and in writing about any aspect of the Services including quality which do not conform to the plans, specifications or schedules of Services and other documentation that might be unsatisfactory for any other reasons of designs, work or cost. Refer recommendations to scheme consultant/line manager for a decision on further instruction. |
| 1.3 | Continuously monitor work on site in accordance with the Contractors Method Statements and the Construction Health and Safety Plan, and endeavour to ensure the safety of all persons affected by the Services. Promptly report breaches to contractors and consultants in written form. Undertake scaffolding inspections. |
| 1.4 | Maintain and issue weekly progress reports for all visits, including weather instructions, amendments, labour force, quality, Health and Safety, test results. |
| 1.5 | Examine, as far in advance as possible, all contract documents and drawings on individual schemes for discrepancies. Attend pre-contract meetings. Report on the contractor’s anticipated building programme and on the performance of contractors and external consultants |
| 1.6 | Check that progress is maintained according to the building programme and advise on any likely cause for delay to the services consultant.  . |
| 1.7 | Prepare and attend snagging inspections and advise the schemes consultant prior to the issue of Certificate of Practical Completion. Ensure that schedules of defects after handover are maintained, and their rectification before the expiration of the defects liability period. |
| 1.8 | Work in collaboration with members of the Project Design Team and clients to ensure projects, both pre and post contract, run smoothly and objectives are achieved. |
| 1.9 | Where approval samples are available, compare work carried out against samples and ensure that it’s consistent with the original. |
| 2.0 | Examine, as far in advance as possible, all contract documents and drawings on individual schemes for discrepancies. Attend pre-contract meetings. Report on the contractor’s anticipated building programme and on the performance of contractors and external consultants. |

**Lot 10 - Asset / Estate Management**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * BSc (Hons) Accounting and Finance * MSc Building Surveying * CPM Certification | |
| **Typical Specification required to be carried out by the consultant** | |
| **STAGE 1** |  |
| 1.1 | Specialist Property Advice:  • Property Reviews  • Feasibility Studies  • Option Appraisals  • Business Cases  • Development Appraisals  • Planning Advice  • Strategic Property Advice  • Relocation Studies including design development  • Building Surveying  • Contract/Project Management  • Equality Act 2010 compliance assessments  • Representations to the Lands Tribunal, Arbitration and Courts  • Any other related services which may be required |
| 1.2 | Operational Property Management:  • Rent Reviews  • Lease Renewals  • Valuations  • Rating  • Search / Acquisitions  • Disposals  • Dilapidations  • Landlord and Tenant  • Any other related services which may be required |
| 1.3 | Rent Reviews  Undertaking rent review negotiations on properties leased, while recognising the importance of minimising the level of rental commitments. Prior to negotiating any review, the Client Organisation would require recommendations as to the appropriate settlement level to be targeted during discussions. During negotiations, the Client Organisation would require frequent updates as to how matters are progressing and the likelihood of reaching a satisfactory conclusion. No offer to settle or referral of a review to a third-party determination can be made without the Client Organisation prior written acceptance. In negotiating any reviews where the Client Organisation are effectively landlords, we would seek to maximise rental value to offset any rental commitments. Any review should be conducted with a view to maintaining a good landlord and tenant relationship. |
| 1.4 | Lease Agreements/Renewals  Background note; a high proportion of Public sector bodies now requires that all Lease Breaks and Lease Ends are subject to the development and submission of a comprehensive Business Case for approval. All Business Cases require to be developed in line with the Green Book principals.  This process provides the opportunity to ensure that the best possible terms of any occupational lease are negotiated on behalf of the Client Organisation |
| 1.5 | Valuations  Property Portfolio – Desk Top Valuation  To undertake annual valuation of owned / freehold land and property portfolio (except in the year of a full valuation. These valuations will be reported annually by the Client Organisation and therefore require to be in a suitable format to comply with International Financial Reporting Standards (IFRS).  Valuations are carried out on the basis of Existing Use and Open Market Values and are undertaken in accordance with the most recent Appraisal and Valuation Manual as determined by the Royal Institution of Chartered Surveyors (RICS). |
| 1.6 | Rating  To provide a complete rating service which is designed to limit the rating liabilities of the Client Organisation by the following:  • Challenging Rateable Values  • Advising on Rates Avoidance  • Providing Specialist Advice  Pursue potential financial savings throughout the year and not just at time of Rating Re-Valuation by the following:  • General Appeals  • When buildings are vacated and occupied  • When buildings are refurbished  • When occupation changes  • When a change occurs to the building or the surrounding environment which is material. |
| 1.7 | Search / Acquisitions  • Review and agreement of search brief and influencing factors  • Market appraisals  • Property search of Government Estate  • Property selection and inspection including environmental credentials  • Negotiation and agreement of terms  • Co-ordination of legal formalities and any fit-out issues |
| 1.8 | Disposals  • Undertaking on-site inspections for property appraisals  • Advice on existing and potential alternative uses  • Development appraisals / values  • Lease appraisals  • Marketing strategy  • Implementation of marketing plan  • Liaison with interested parties  • Marketing of owned / leased office space  • Undertaking viewings  • Agreement of Heads of Terms  • Liaison with solicitors to conclusion of legal agreements |
| 1.9 | Dilapidations  • Discussions with the Client Organisation with regards to dilapidations and subsequent negotiations  • Preparation of interim or terminal Dilapidations schedules on behalf of the Client Organisation acting as Landlord and/or Tenant  • Negotiation of final settlements with Landlords and Tenants, Sub-Tenants on level of settlement of claims  • Providing Specialist Advice |
| 2.0 | Landlord and Tenant  • Proposals to assign or sub-let by tenants  • Applications to surrender leases  • Application to alter property  • Enforcement of repairing obligations  • Applications to extend properties  • Administration of breaches of lease terms by tenants and subsequent action  • Administration of notices to quit and co-ordination of tenant vacation of premises |

**Lot 11– Funding Solutions and Bid Writing**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * (CEng) * BA(Hons) English * BSc (Hons) Accounting and Finance * PQQ Bid and Tender Training | |
| **Typical Specification required to be carried out by the consultant** | |
| **GENERAL** |  |
| 1.1 | The Consultant shall provide full or part bid writing process to cover the following points:   * Writing * Design * Layout * Formatting * Proofreading * Printing   The consultant shall provide structured meetings, reviews and offer a costed menu basis where the Client Organisation can be involved in the bid process as much or as little as they like. |
| 1.2 | The Consultant shall provide bid writing and management to cover the following points:   * Overall strategy * Various themes * Storyline * Win plan * Customer focus, * Value management * Compliance |
| 1.3 | The Consultant shall provide the facilitation of the bid writing process to include the following areas:   * Bid meetings * Team co-ordination * Problem solving * Options appraisal * Tender review |
| 1.4 | The Consultant shall provide facilities to enable the preparation and submission of the documentation to include the following areas:   * Formatting * Printing and binding * Co-ordination * E-tendering |

**Lot 12 – Archaeological**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * The Chartered Institute for Archaeologists (CIfA) * BA (Hons) Archeology | |
| **Typical Specification required to be carried out by the consultant** | |
| **GENERAL** |  |
| 1.1 | Archaeological consultancy shall cover, but not limit to, the following:   * maintain high standards of professional conduct, competency and integrity in their working relationships with clients, colleagues, suppliers and other stakeholders * give advice based on a sound understanding of the heritage issues and, through the provision of advice, seek to manage change within the historic environment, reconciling wherever possible the need to conserve and enhance significance with the needs of their clients. * ensure that any investigation has a defined research objective, complies with the appropriate Standards and guidance and is conducted in a way to optimise a research output proportionate to the nature and results of the investigation * ensure that advice is provided in accordance with relevant national and local policy and national and regional guidance   Appointed Consultants should:   * ensure that their advice regarding the scope of any assessment of archaeological or cultural heritage significance complies with the relevant CIfA Standard and Guidance and is sufficient to ensure as full an understanding as is reasonably possible of the potential impact of change on the asset’s significance. This should include consideration of all aspects of the historic environment, be proportionate to both the significance of the asset(s) and the potential impact of the proposal on them and be clearly explained and reasoned. Where CIfA members or registered organisations form part of a team, with elements undertaken by other contractors (such as historic building recording, landscape and visual assessment) advisors should advise clients of the importance of integrating all aspects of historic environment work. * ensure that clients are aware of a range of potential courses of action and the costs and risks associated with them * where possible, promote community engagement with the historic environment, seeking to ensure that archaeological investigation is directed toward providing benefit to the public, whether directly through participation and engagement in the process, where it is appropriate to do so, or indirectly through the increase in knowledge that the results of investigation provide to the local and wider community. Such engagement should be proportionate to the scale, nature and circumstances of the work * where appropriate to the nature and significance of the results, promote in addition to formal publication the use of innovative forms of dissemination which produce wider public benefit than conventional methods of publication. These might include the use of different forms of media, exhibitions or events * satisfy themselves that adequate provisions are made for completing the project to the required standards. * ensure that a clear and transparent process exists for dealing with real or perceived conflicts of interest. In particular, archaeologists whose professional responsibilities combine recommendations about investigation and/or management with its execution must clearly indicate the combination of these interests to all relevant parties and ensure formal protocols or codes of practice are put in place to prevent any conflicts of interest |

**Lot 13 - Sustainability and Environmental Consultant**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * BSc Environmental Sciences * (CIEEM) The Chartered Institute of Ecology and Environmental Management Membership * (IEMA) Institute of Environmental Management and Assessment Membership * (CEnv) Chartered Environmentalist Membership | |
| **Typical Specification required to be carried out by the consultant** | |
| **STAGE 1** |  |
| 1.1 | Receive the Client Organisation’s initial brief from the Project Manager and provide such assistance as is necessary to identify possible sustainability assessment options and criteria. |
| 1.2 | Consult as necessary with appointed planning consultant or lead consultant to attain contract oration of required matters relating to required sustainability and environmental performance targets for the proposed Services. |
| 1.3 | With assistance from the Project Manager in coordinating Client Organisation and all other Consultant Disciplines, conduct Initial Sustainability/ Pre-Assessment meetings. Intimal meeting can be arranged to form part of development planning meeting. |
| 1.4 | Determine an initial suitable compliance path, Pre-assessment estimates and actions required to achieve Rating and/ or Environmental Performance requirements based on Client Organisation brief and development requirements. The viability of compliance path to be reviewed strategically at a later project stages with input from the entire project team. |
| 1.5 | Advise Project Manager/ Lead Consult of any specific certification costs and optional requirements for other consultant inputs and further studies as may be necessary in order to achieve Rating and/ or Environmental Performance requirements. |
| 1.6 | Contribute to value management exercises by evaluating/ providing Pre-assessments options. |
| 1.7 | Attend sustainability meetings as necessary |
| 1.8 | Obtain the Project Manager's approval to proceed to Stage 2. |
| **STAGE 2** |  |
| 2.1 | Register the Project with the certification body, as necessary. |
| 2.2 | In co-operation with the Consultant Disciplines chair and manage Sustainability Certification/ Environmental Performance Serviceshops with the Client Organisation and Design Team. |
| 2.3 | In co-operation with other members of the Project Team, update Sustainability Certification/ Environmental Performance Pre-assessment based on the development of outline design proposals and specialist consultant inputs and submit to the Client Organisation and Project Team. Incorporate advice on energy conservation and energy targets. |
| 2.4 | Make recommendations to the Project Manager and Project Team on the need for specialist input to the design development for specific elements of the Services required to support the attainment of the required Sustainability Certification/ Environmental Performance target. |
| 2.5 | Assist the Project Team by providing required sustainability Pre-assessment details to support applications made to Statutory Authorities and obtain approvals. |
| 2.6 | Manage the Sustainability/ Environmental Performance process by ensuring Project Team are kept updated on specific requirements by issuing regular progress reports. |
| 2.7 | Provide feedback to the Project Management and Design Team on the quality of evidence developed to prove compliance and how to improve for compliance with the assessment certification body. |
| 2.8 | Assist the Design Team during value engineering process to ensure value engineering solutions will not impact upon sustainability performance requirements or certification. |
| 2.9 | Where required provide guidance to the Design Team preparing the tender documentation to enable Building Contractors to comprehensively price the project. |
| 2.10 | Where required submit the evidence of sustainability compliance to the relevant certifying body. Issue the interim Certificate as received from the certification body. |
| 2.11 | Attend sustainability meetings as necessary |
| 2.12 | Obtain the Project Manager's approval to proceed to Stage 3. |
| **STAGE 3** |  |
| 3.1 | In co-operation with the Consultant Disciplines attend Contractor Briefing Serviceshop and provide any clarifications regarding project Sustainability Certification / Environmental Performance. |
| 3.2 | Attend the meetings as necessary with the Contractor and the other members of the Project Team in order to monitor the progress in relation to the targeted Sustainability Certification/ Environmental Performance requirements. |
| 3.3 | Until completion of the project, report to the Project Manager at intervals on the progress of the Sustainability Certification / Environmental Performance targeted requirements. |
| 3.4 | Visit the site at required/ necessary intervals during the construction of the Services in order to witness the inclusion of the elements contributing to the Sustainability Certification / Environmental Performance and to contractor that the Services are completed fully in accordance with the targeted requirements. |
| 3.5 | Inform the Project Manager of any issues related to sustainability performance which may arise during the course of the Services. |
| 3.6 | Provide feedback to the Project Management and Construction Team on the quality of evidence developed to prove compliance and how to improve for compliance with the assessment certification body. |
| 3.7 | Where required submit the evidence of sustainability compliance to the relevant certifying body. Obtain the Final Certificate as received from the certification body |
| 3.8 | Specifically, in relation to Post Occupancy Evaluation (POE), a draft version of the completed O+M documentation to be reviewed and comments on POE related elements will be issued to the Project Manager and Contractor. |
| 3.9 | Where appropriate obtain the Project Manager's approval to proceed to Stage 4. |
| **STAGE 4** |  |
| 4.1 | Specifically in relation to Post Occupancy Evaluation (POE), in the first weeks post occupancy, organise and chair a meeting with the facilities staff and development contractor (as appropriate) ensure that the hard data on the building’s performance (electricity, gas, water, temperatures, etc.) are being collected in line with the designer’s plan. |
| 4.2 | As part of POE assist in the preparations and completion of a building user survey to understand how the users are working within the building. Agree extent of survey and relevant question sets with building users’ representatives. Analyse results and provide initial recommendations. |
| 4.3 | In co-operation with building users assist in analysing the building’s POE performance and meeting as necessary to discuss the findings and advise suitable recommendations. |

**Lot 14 – Town and Master planning**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * BSc Urban Planning and Development * (MPlan) Master of Planning * Licentiate APC * RTPI Royal Town Planning Institute Membership | |
| **Typical Specification required to be carried out by the consultant** | |
| **GENERAL** |  |
| 1.1 | Provision of a broad range of consultancy advice to assist town and master planning within the Public Sector with regards to construction and premises. Key services include:   * understanding population trends, to predict the demands that will be made on an area, whether urban or rural * working with other professionals, such as architects, landscape architects, civil engineers, construction managers and surveyors * liaising with the public and councillors, attending public meetings about planning issues, such as proposals for a new road or school * knowledge of the legal issues associated with land use * making policies and implementing them * working both indoors and outdoors and presenting evidence at meeting |

**Lot 15 – Heritage**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * BSc (Hons) Wildlife Conservation * MA Professional Practice in Heritage Management * Assoc RICS, MRICS or FRICS Royal Institution of Chartered Surveyors Membership * Register of Architects Accredited in Building Conservation | |
| **Typical Specification required to be carried out by the consultant** | |
| **GENERAL** |  |
| 1.1 | Provision of a broad range of consultancy services, for example but not limited to;  Project Management, Quantity Surveying, Building Surveying, Architectural Services on heritage projects within the Public Sector with regards to construction and premises.  Key services include, but not limited to:   * To carry out research, undertake site visits and prepare reports and plans primarily, but not necessarily exclusively, for heritage projects; * To prepare historic building assessments, statements of significance and other similar documents including those relating to the potential ‘spot listing’ of buildings; * To prepare Conservation Area Appraisals and other similar area-based assessments; * To prepare Heritage Statements and Design and Access Statements to accompany listed building and planning applications; * To prepare and submit listed building consent, planning and other related applications including requests for pre-application advice; * To attend meetings with clients and their consultants and assist in giving heritage, design and planning advice on the appropriateness of their proposals; * To liaise with local authorities, English Heritage, national amenity societies, local groups and individuals to promote schemes on behalf of the company’s clients. * To assist in the preparation of evidence to support appeals against the refusal of listed building, conservation area or planning consent; * To assist in the promotion of the company through personal contacts with current and potential clients, attendance at events and conferences and in any other ways that would be beneficial to the company; * To keep abreast of all relevant statutory and local policy changes and heritage best practice and; * To undertake any other duties commensurate with the skills and experience of the post holder and the needs of the company. |

**Lot 16 – Health & Safety Consultant**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * NEBOSH National Diploma in Occupational Health and Safety. * British Safety Council Level 6 Diploma in Occupational Safety and Health. * City & Guilds Level 5 (NVQ) Diploma in Occupational Health and Safety Practice. * National Compliance and Risk Qualifications (NCRQ) Level 6 Diploma in Applied Health and Safety. * National Examination Board in Occupational Safety and Health (NEBOSH) National General Certificate in Occupational Health and Safety. | |
| **Typical Specification required to be carried out by the consultant** | |
| **GENERAL** |  |
| 1.1 | Typical requirements from the Health & Safety consultant:   * Preparation of health and safety strategies. * Undertaking risk assessments. * Liaising with regulatory authorities to ensure compliance with mandatory regulations. * Investigating any accidents on site and documenting reports and recommendations. * Undertaking site inspections to ensure that policies and procedures are being properly implemented. * Delivery of Construction (Design and Management) - CDM – Services, including Principle Designer * Review of contractor documentation. * Interfacing with clients and design teams on a project basis.   Consultants can advise on a range of issues which include:   * Dealing with deleterious materials, such as asbestos. * Health issues. * Noise and vibration problems. * Stresses and strains. * Assisting people returning to work after a serious injury or illness.   As Principle Designer, Consultants should   * Assist in the development of the initial brief * Plan, manage and monitor the co-ordination of the pre-construction phase * Help clients identify, obtain and collate pre-construction information * Provide pre-construction information to designers, principal contractor and contractors * Co-ordinating significant health and safety issues with the design team through to resolution * Ensure that designers co-operate with each other and comply with CDM 2015 * Attend design review meetings * Support the principal contractor in seeking and obtaining responses to health and safety queries from designers * Agree a format for and compile the statutory health and safety file for formal handover at project completion * Communicate progress and raising awareness of potential health and safety issues * Ensure RIDDOR investigations are carried out and appropriate reporting is undertaken. * Arbitrate on client/principal contractor CDM and construction health and safety disputes * Undertake on-site CDM compliance inspections and report back to the client |

**Lot 17 - Fire Engineer**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * The Institute of Fire Engineers (IFE) Level 4 Certificate in Fire Science and Fire Safety * IFE Level 5 Diploma in Fire Engineering Design * IFE Membership * TIFireE, MFireE, FFireE * CEng (Chartered Engineers), IEng (Incorporated Engineers), EngTech (Engineering Technicians) * BEng Fire Engineering | |
| **Typical Specification required to be carried out by the consultant** | |
| **GENERAL** |  |
| 1.1 | Typical requirements from the Fire Engineering consultant:   * the assessment of the hazards, risks of fire and its effects, * the mitigation of potential fire damage by, * proper design, construction and layout * use of buildings, materials used, structures, industrial processes, transportation systems and similar * the appropriate level of evaluation for the optimum preventive and protective measures necessary to limit the consequences of fire, * the design, installation, maintenance and/or development of fire detection, fire suppression, fire control. Also fire related communication systems and equipment, * Post-fire investigation and analysis, evaluation and feedback.   Consultants can advise on a range of issues which include:   * the spread and the control of fire and the associated products of combustion, * the spread within and outside buildings/structures, * how fire can be detected, controlled, and/or extinguished, * flame, inhibition of combustion and toxicity etc. * Use of electricity in flammable atmospheres, structural fire protection of buildings, design of fire detection and alarm systems, fire appliances, sprinklers and other automatic fire fighting systems, hazard assessment of industrial plant, chemicals, arson investigation and fire insurance. etc. * behaviour pattern of persons faced with emergencies e.g. their reaction to alarms, design of escape routes, reaction to stress and its mitigation. * emergency planning, cost/benefit analysis and management, in commercial fire engineering management, financial control, motivation of staff, etc * drafting, implementation and enforcement of fire safety legislation, litigation arising from fires, e.g. acting as an expert witness in both civil and criminal cases, etc. |

**Lot 18 - Asbestos Consultancy**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * Asbestos Awareness (Category A) * P401 - Identification of Asbestos in Bulk Samples (PLM) * P402 - Surveying and Sampling Strategies for Asbestos in Buildings * P402RPT - Report Writing for Asbestos Surveys * P403 - Asbestos Fibre Counting (PCM**)** * P404 - Air Sampling of Asbestos and MMMF and Requirements for a Certificate of Reoccupation Following Clearance of Asbestos * P405 - Management of Asbestos in Buildings | |
| **Typical Specification required to be carried out by the consultant** | |
| **GENERAL** |  |
| 1.1 | Providing a management consultancy service in the areas of asbestos management and abatement.  Reviewing and commenting on construction work/projects where asbestos Services may be necessary including the provision of information for any construction work/projects and contractor’s method statements.  Auditing of asbestos removal Services including, but not limited to, attending pre-start, progress and completion meetings. Reporting of any defects or non-compliances relating to the Asbestos Removal Contractor’s (ARC) performance.  Providing air monitoring and other analytical services during abatement Services. Issuing Certificates of reoccupation following completion of all asbestos abatement Services.  Issuing project completion packs to include all monitoring results, clearance certification, technical specifications and other pertinent information to the Services.  Update and issue survey reports as instructed, to include update of plans following the removal or reduction of risk of asbestos containing materials.  Perform re-inspections of Asbestos Containing Materials (ACMs) where instructed.  Bringing to the attention of the Officer in Charge any concerns regarding the management of asbestos on Client Organisation premises.  Provide training programmes for Client Organisation staff. |
| 1.2 | Attendance of meetings throughout Services to advise and assist with survey requirements and with the control/management of asbestos throughout the lifecycle of all projects.  Prepare and issue scope of Services documents for all project specific asbestos surveys (refurbishment/demolition surveys).  Act as an extension of the team during projects and report any issues regarding the management of asbestos during projects or within the wider organisation to the team.  Prepare and issue technical specifications for asbestos abatement Services to the Client Organisations asbestos removal contractor. To include details relating to:   * Notification * Provision of documentation * Site establishment & work Areas * Hygiene facility * Control measures & working methods * Waste disposal & emergency procedures * Analytical requirements   Detailed scope of Services  Items identified on project survey to remain in situ following Services  Evaluate the ARC’s tender return against ARC’s schedule of rates.  Liaise with ARC regarding programming of Services and ensure sufficient resource for entirety of project.  Provide ongoing advice to the various project teams regarding the management of asbestos.  Update survey reports after completion of all air monitoring and asbestos removal Services, provide in a format agreed by Client Organisation.  Provide expert witness services as and when required. |
| 1.3 | Performing surveys for the presence of asbestos in line with current legislation on Client Organisation buildings, as requested.  Ability to perform surveys within 5 working days of instruction.  Surveys to be performed to assist with the on-going management of asbestos and also in advance of refurbishment or demolition projects.  High risk items to be notified immediately verbally to the representative who commissioned the Services (Client Organisation) and additionally within 24 hours notification is to be communicated to the Client Organisation.  Survey report to include, at a minimum:   * Executive summary * Introduction (covering scope of Services) * General site and survey information (to include relevant responsibility structure) * Survey results (including photographs, material assessment results, priority assessment results and final risk assessment calculation and recommendations) * Conclusions and actions * Bulk analysis certification * Asbestos register * Site plans   Draft reports for all refurbishment and demolition surveys to be issued to the Client Organisation for authorisation prior to issue of full reports.  PDF and word versions of the management surveys and PDF versions of draft refurbishment and demolition surveys to be provided within 15 working days of completion of site work.  Perform re-inspections of existing Type 2 or management surveys as requested by the Client Organisation.  Provide on-line versions of the asbestos register, to include details of material/priority assessments, including all relevant attachments e.g. jpeg files of photographs, pdf files of bulk analysis certificates. Site plans to be updated in AutoCAD where appropriate and reissued with PDF conversions at report issue. Client Organisation drawing format to be used. |
| 1.4 | Providing air monitoring (background, leak, clearance and reassurance testing) during asbestos abatement Services.  Providing personal monitoring for the ARC during asbestos abatement Services.  Perform, where appropriate, differential pressure monitoring of enclosures to current HSE guidance.  Issuing of certificate of reoccupation paperwork following all asbestos abatement Services. Documentation must make clear reference to survey report sample references.  Provide information (including photographic evidence) to allow the updating of the asbestos register following all abatement Services, information to be provided in a Client Organisation (as appropriate) agreed format.  Independently review and report upon the ARC’s onsite documentation, including operative records (medical certification, RPE fit testing, training documentation) and plant records (DOP testing certification).  Provide periodic air monitoring when required, including upon discovery of suspected ACM or accidental disturbance of known ACMs.  Reporting to the Compliance/H&S Team any defects or non-compliances relating to the ARC’s performance including suitability of work areas, adherence to method statement and compliance with Client Organisation policy.  Providing emergency air monitoring and bulk sampling following disturbance or discovery of ACMs or suspected ACMs (within 12 hours of notification).  On an ad hoc basis provide dust sampling and analysis  As requested, collect and analyse bulk samples of suspected ACMs, including emergency service following the discovery of suspected ACM. |
| 1.5 | Survey reports and site drawings to be in a format agreed with the Client Organisation prior to contract commencement, reports to be issued 15 days after completion of site work.  During abatement Services, copies of air monitoring certification and certificates of reoccupation to be provided to the relevant team/Client Organisation following each shift, ideally by electronic means.  Following the completion of asbestos abatement Services a project completion pack is to be issued to the Client Organisation representative and H&S team. This is to include, but not limited to, smoke test certificates, air monitoring certificates, Certificates of Reoccupation, DCU clearance, information for asbestos register updates, ARC on-site documentation reports, differential pressure monitoring results. PCP to be issued no later than five working days after the completion of the Services.  Attendance of a regular contract review meeting. Meetings to initially be held monthly with a view to being extended to occur on a quarterly basis. |

**Lot 19 – Water Consultancy / Legionella**

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| **Typical Qualifications required by the consultant, memberships and associations** | |
| * BSc Environmental Sciences or related subjects such as Geology or Geography * Thorough understanding of NICE (National Institute for Health and Care Excellence Guideline- Indoor air quality at home) legislation relating to water and indoor air quality * Membership to (FWA) The Future Water Association * Membership to (WMC) The Water Management Society * W014 - Managing the Risk of Legionella in Cooling Tower Systems * W018- Legionella Risk Assessment in Cooling Systems * W024- Practical Legionella Risk Assessment Hot & Cold Water Systems | |
| **Typical Specification required to be carried out by the consultant** | |
| **GENERAL** |  |
| 1.1 | Water consultancy shall cover, but not limit to, the following areas:   * Water Testing Services * Drinking Water Testing * Water Sampling Services * Pseudomonas * Chemical * Total Viable Count * Coliforms & E coli * Enterococci * Sulphite Reducing Clostridia including Clostridium perfringens * Legionella testing * Legionella Risk Assessment & Reviews * Legionella Testing Services * Legionella Management Services * Legionella Policy & Auditing * Swimming Pool water testing |
| 1.2 | Identify all the hazards and hazardous events that can affect the safety of a water supply;   * Assess the risk presented by each hazard and hazardous event * Consider if the controls or barriers are in place for each significant risk and if these are effective * Validate the effectiveness of controls and barriers * Implement an improvement plan where necessary * Demonstrate that the system is consistently safe * Regularly review the hazards, risks and controls * Keep accurate records for transparency and justification of outcomes |

1. **Social Value**
   1. The Contracting Authority and Pagabo have embraced Social Value and within the past 10 years, social value has become increasingly important for all organisations engaged with the public sector for the supply of goods or services, land acquisition and planning or the delivery of projects. This framework will embrace social value through both impact and value. By measuring the impact will indicate whether or not the project is creating good work or making a difference. By putting a financial value to what is achieved and what the long-term value is will support business decisions that achieve the most social, economic and environmental benefits.
   2. The Contracting Authority and Pagabo see this framework as building on the foundations of the Professional Services framework keeping it at the front end of driving the social value agenda. Pagabo has recently published its social value policy which sets out our core aims and how we support clients and suppliers to maximise social impact and social value through the procurement and deliver stages.
   3. As part of the Professional Services framework Consultants will be expected to deliver Social Value KPIs that will benefit the local residents, communities and businesses where a client project is located. The Social Value KPIs cover a number of different types of activities that will create social, economic and environmental impact and value. The KPI activities that are expected will be focused on the following: -

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| **Employment and Skills** - **focusing on the individuals benefitting from the opportunities** |
| * Jobs sustained within the industry and new jobs created * Outcomes will include distance from the labour market individuals have come * Apprenticeships measured on new opportunities and supporting those to complete qualification * Educational Engagement, Employability Support and Work Experience will enthuse industry workforce * Upskilling and enabling Continuous Professional Development of workforce * Qualifications used as a measure towards organisation commitment * Community engagement and support provide relevant expertise, resources and/or finance |
| **Environmental Impact and Sustainability** |
| * Reducing waste, resources and adapting to climate change will feed into sustainability strategies form suppliers, clients and their communities in a real and tangible way * Climate change focusing on carbon or equivalent outcomes, such as Greenhouse Gas Emissions, Improved Air Quality, and Sustainable Transport * Outcomes that measure, evidence and embed a culture of responsible sourcing and efficient use of materials and utilities |
| **Local Economic Benefit through Supply Chain and Labour Spend** |
| * Outcomes that measure the financial spend on businesses, contracting services, materials and products, through sustainable meaningful employment paid in line with the Living Wage * Spend within the locality, defined by the client, will enable us to measure and evidence the local economic benefit of the product, service and/or contract. |
| **Supporting local economic growth and Economic Uplift (Gross Value Added)** |
| * Safeguarded and new employment will lead to increased productivity and economic growth, measure through a GVA (Gross Value Added) calculation |
| **Inclusive Growth – Making our economy work for everyone** |
| * Socially benefitting people across the labour market spectrum, including groups that face particularly high barriers to high quality employment. * Investing in places to address inequalities in economic opportunities between different parts of the country, region and district. |

* 1. Contracting Authority and Pagabo is the leading public sector framework agreement specialist for delivering social value. To date, we have accounted for over £1.5bn social value and economic impact through our frameworks. The recent Cabinet Office review of the Public Services (Social Value) Act 2012 has placed more emphasis on embedding social value in the delivery of Built Environment projects. In anticipation of the legislation changes, Pagabo have placed a strong emphasis on awarding contracts on the basis of their social value capabilities including monitoring, measurement and reporting social value.

1. **Supporting eco-systems**
   1. Where Consultants engage a range of suppliers, sub-Consultants and supply-chain partners (collectively their eco-system) to assist in delivering their project(s), Consultants are expected to maintain appropriate systems to ensure these are transparently managed.
   2. The definition of eco-system partners under this framework is:
      1. Micro – Less than 10 employees and/or a turnover less than £1m p.a.
      2. Small – 10-50 employees and/or turnover between £1m and £10m p.a.
      3. Medium – 50-250 employees and/or turnover between £10m and £50m p.a.
      4. Others – All others

\****Please note that the ‘Micro’ definition should exclude Head Office, Holding Companies which may have an unrealistically low employee count or declared turnover.***

* 1. Consultants are expected to demonstrate that all members of their eco-system are able to trade in a sustainable manner, and that there is no 'forced' discounting or unreasonable terms applied in exchange for future business.
  2. Consultants are expected to demonstrate that all payments to their eco-system are made to the terms they have agreed with them, that the payment terms are fair i.e. within 30 days from date of an undisputed invoice and that any disputes or queries are managed properly and promptly under a transparent and agreed process.
  3. Consultants are expected to undertake regular eco-system reviews. Reviews should be simple, clear and used to encourage strong relationships between the Consultants and their partners. Reviews should cover all areas of the relationship and should be considered as 360-degree approach, i.e. understand how the Consultant has performed as well as their partners.
  4. Consultants are expected to share their Social Value ethos with their eco-system partners. They are expected to have systems in place to demonstrate that their suppliers understand their (Consultant) SV commitments, their ethos and that there is a synergy in aspiration and purpose.

1. **Technology**
   1. There is a commitment to improving the use of technology to measure and assess performance under this framework, to achieve reduced cost(s) and improves overall VFM for all stakeholders.
   2. Consultants should demonstrate a commitment to the use of technology to support communication throughout their supply-chain.
   3. All data submissions under the terms of this framework will be provided either via a PagaboAPP collection tool and/or through 3rd party integration with the Consultant’s own MIS.
   4. The PagaboAPP shall be:
      * A central hub for Clients, Suppliers, Stakeholders to engage with Pagabo, Pagabo managed frameworks; to submit information, data, KPIs, register projects and respond to opportunities.
      * Cloud-based and platform agnostic across PC, Laptop, Tablet and Mobile.
      * Client features
        + Access Pagabo managed frameworks and review T&Cs, suppliers and Consultants
        + Register projects and opportunities
        + Manage procurements
        + View KPIs across a Client dashboard - SV, sustainability, suppliers, Consultants, etc.
        + Collaboration tools
        + Self-service administration including data submission and accessing returns and KPIs
      * Suppliers/Consultants
        + Access Pagabo managed frameworks and DPS, review T&Cs, respond to new frameworks, further competitions and manage DAs
        + View and apply for client opportunities
        + View KPIs across a Supplier/Consultant dashboard - SV, sustainability, projects delivered, pipeline etc.
        + Access learning materials – Videos, Podcast’s, soft-materials
        + Collaboration tools
        + Self-service administration including data submission and accessing returns and KPIs
2. **Performance Management**
   1. The performance of Appointed Consultants to the framework agreement shall be monitored and assessed on a regular basis. This will be carried out through Contract Management of the Appointed Consultant and through their performance to execute major projects efficiently and effectively.
   2. The process, how, what and when information is to be collected and returned is contained in the following spreadsheet.
   3. Appendix 1 - Consultant Performance



1. **Marketing**

* 1. The Framework Manager proactively market and seek to expand participation in and usage of its framework agreements across all public sectors. Gaining a place on this framework agreement will entitle you to the following marketing aspects: -
* Monthly Dashboard including details on current framework position, current projects, signed up Clients, regional and sector breakdowns
* Access to other sectors by promoting through other framework agreements
* Social Media Links from Pagabo; twitter, blog, etc.
* Promotion to all our current Client Organisations that have a genuine interest and use the current range of Pagabo Framework Agreements
* General marketing campaigns, general sales/marketing telephone calls
* Copy of the Pagabo newsletter detailing information on current projects, procurement information, tips and hints on good procurement practice. Presence within the newsletter that that will go to all opted-in Public Sector Bodies
* Opportunity to have your own individual User Guide detailing your organisations relevant contact details highlighting your place on the framework agreement

* 1. Consultants will be required to demonstrate their previous marketing activities that have been undertaken through similar framework agreements or contracts and what benefits have been realised from these marketing activities.

1. **Account Management**
   1. Consultants are required to have sufficient resources to enable the framework to operate successfully during the whole life of each individually let contract. Such resources should, as a minimum, include or be sufficient to meet the following roles/requirements:

* Account/Contract manager – at a decision-making level of authority
* Contract review meetings two per year
* Provision of timely response to faults
* Provision of product development strategy and updates
* Acting as escalation points for dispute resolution/contract management issues
  1. There is a requirement within the contract conditions to ensure that there are clear dispute resolution procedures, including a structured escalation process.
  2. Consultants will be required to demonstrate continuing Best Value to the Framework Manager. This may include the following areas:
* How relationships with the Framework Manager would be developed
* Contributing towards efficiencies
* Improving communication and service processes
* Planning for future requirements to ensure needs are met
* Suggesting alternative products
  1. Consultants are required to ensure that a comprehensive and clear complaints and escalation procedure is in operation from the start of the framework agreement.
  2. Due to the size of the agreement, and the potential for a UK wide framework, Consultants must be able to demonstrate their ability to manage a contract of this nature. This will include developing lines of communication and relationships with the Framework Manager, holding contract implementation and review meetings, reviewing spend patterns, etc.
  3. The Framework Manager require the provision of management information on a regular basis including reports such as total spend by authority, number of projects undertaken, total spend by account number and other bespoke reports as required. This should be submitted in a dashboard format on a monthly basis within 2 weeks of the month end.
  4. Consultants are expected to allocate a direct point of contact who is responsible for delivering the Pagabo message through the organisation. This contact would become a day to day contact for the Framework Manager to liaise with and ideally should be dedicated to the Framework as their primary function. This is to ensure that the Consultant has a dedicated resource committed to achieving the Key Performance Indicators of the Framework and the Consultant’s success.
  5. Consultants will be required to submit the Dashboard on current projects on a monthly basis, within 2 weeks of the month end. This requirement will be monitored within the framework KPI’s and alongside the project performance.  The Consultant will be expected to support the framework and the projects which are facilitated through the framework through the Expression of Interest and Further Competition process.
  6. Each Consultants’ performance will be evaluated, reviewed and discussed on a quarterly basis.
  7. Participating Client Organisations may wish to reduce the number of invoice transactions and so appointed Consultants will be required to provide consolidated invoices where requested to do so.

1. **Training**
   1. Consultants are required to train their staff on all relevant aspects of this framework agreement including the types of procurement processes available to Client Organisations. The Account/Contract Manager shall be highly trained to understand how the framework can be utilised effectively and efficiently to the benefit all framework users.
   2. Other training requirements on framework operation and compliant aspects are mentioned throughout the specification as required.