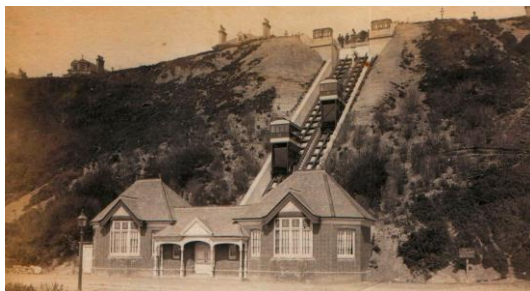




Thanks to National Lottery players

Leas Lift – Restoring Folkestone’s Gem for the community

ITT for MEP Services Engineer



Issue Date: [8th April 2022]

Response Date: [5th May 2022 at 5PM]

Background

Leas Lift is a Grade II* (Historic England No. 1061185) cliff funicular railway situated in the Leas & Bayle Conservation Area in Folkestone. The Lift's listing covers: the waiting rooms which were designed by Reginald Pope in a Domestic Revival style and built by John Newman, a local builder; pump room, which was added in 1890 in a similar style with a second lift (removed in 1985); lower station tanks, track, cars, wheel houses; and tank room, upper station tunnel and railings. The listing specifically highlights four areas of significance: rarity of a lift of this type - one of only three remaining water-balanced lifts in the UK; engineering and structural interest; rarity and degree of survival of the working machinery; and architectural interest of the waiting rooms and pump house.

Leas Lift opened on 21st September 1885, connecting The Leas with the seafront, and has carried 36 million visitors. Access remains via The Leas and Lower Sandgate Road through the Upper and Lower lift stations. Each carriage can carry 14 people. In its early years, the Lift enjoyed a great success because it satisfied a need and, being new, had comparatively low maintenance costs. By 1887, a couple of design flaws had been discovered which resulted with the fitting of a new braking system and the replacement of the vertical wooden struts under the sleepers with concrete. Apart from that, the Lift appears to have done so well as to require the addition of a second lift in 1890, at which time a water recycling system was also installed.

The District Council ran the lift until 2009, and then a CIC. In 2017 the Lift closed when the Victorian braking system, which is manually operated, with no adequate failsafe, was deemed to be inadequate by the Health & Safety Executive (HSE). The Lift has been closed since. A new Leas Lift CIC was incorporated in 2018 with new Directors. They have worked hard to keep the buildings in good repair, spent two years building a robust governance model, raising funds, consulting with over 2,500 members of the public and commissioning professionals to understand what is required to restore, re-open and operate the Lift once again for the people of Folkestone and wider community.

This has included:

- Putting the Lift on Historic England's At Risk Register in 2019.
- Commissioning mechanical and electrical condition surveys in 2018 and 2020.
- Commissioning an Access statement in 2019.
- Securing a Project Viability Grant from the Architectural Fund in 2020/21 which explored how the lift could be accessible, potential visitor routes, interpretation and visitor facilities.
- Developing a Business Plan funded by a grant from Folkestone & Hythe District Council.
- An agreement with the Trustees of Folkestone Estate to take over the lease.
- Securing £750K of Section 106 funding.
- Securing a £0.4 million Round 1 grant from the National Lottery Heritage Fund
- Testing demand for a café. A pop-up run by a local business opened in the bottom lift in September 2020. This is helping support the CIO whilst the Round 2 application is being developed.

The CIC submitted an application to the Charities Commission in May 2021 and is now a CIO. This is to support the future fundraising appeal.

Aims of the project

The aims of the project are to:

- restore the lift cars, waiting rooms, pump room, tanks, track, wheel houses and upper station tunnel and railways and re-open the lift to the public by meeting the requirements of the HSE and Mining Inspectorate;
- deliver a programme of heritage engagement activities through outreach and on-site visits and activities, breaking down economic, physical and attitudinal barriers;
- undertake an oral history project which will inform permanent interpretative displays telling the stories of the Lift – why it was built and the wider Victorian context, the engineering behind it, people associated with it, and the restoration.
- improve access to the Upper and Lower lift stations so that all members of the community can access all areas;
- provide an excellent visitor experience with 21st century facilities;
- create employment, transfer heritage knowledge and skills and support apprentices;
- provide work experience and placement opportunities for young people at school, college and university to enhance their employability.
- minimise the carbon footprint of the Lift; and,
- ensure Leas Lift is resilient by developing a highly trained workforce, volunteer corps and sustainable business model.

The local economy will benefit from jobs during the construction period. Once operational the Lift will create 10 FTE jobs, support an apprenticeship, and seasonal jobs. The café will create at least 6 FTE jobs.

Audiences

The Business Plan projects 95,000 paying trips will be made on Leas Lift and 110,000 in a Triennial year. This audience will be made up of:

- Residents of Folkestone and Hythe District Council
- Adult Special interest and leisure groups within a 60 minute catchment
- Day-trippers to Folkestone from within a 90 minute catchment
- Domestic tourists staying in serviced and non-serviced accommodation in Folkestone and with Visiting Friends and Relatives

Timetable

The Development Phase (RIBA 1 to 3) will begin in November 2021 and end in May 2023, when a Round 2 application will be submitted to the National Lottery Heritage Fund. This is to allow time to raise the partnership funding. The capital work will be undertaken during

2024, handover is planned for the Spring 2025, an official opening on 10th April 2025. The three-year Activity Plan will be delivered from January 2024 to December 2026, initially through outreach, and then on-site. The completion report and summative evaluation will be undertaken during the first quarter of 2027.

It is envisaged that the project will be procured traditionally and tendered with a full RIBA Stage 4 Design.

Brief for MEP Services Engineer

This brief is for Mechanical, Electrical and Plumbing Engineers to provide professional services in accordance with the Schedule of Services (Appendix B).

Scope of work

- MEP Services Engineer*
 - RIBA Stages 2 – 3 (Development Stage)
 - RIBA Stages 4 – 6 (Delivery Stage)

Other Appointments will be procured separately: -

- Project Manager
- Fundraising Consultancy
- Architect/Lead Design Consultant (inc. co-ordination of design team marked *)
- Quantity Surveyor
- Principal Designer*
- Structural/Civil Engineer *
- Interpretation & Activity Planner
- Business Planner
- Evaluation Consultant
- Interpretation/Graphic Designers

Timeline

The contract will run from April 2022 to Spring 2026 (split between Development/Delivery: -

Development Activity	Commencing
RIBA Stage 2 – Concept Design	Late May 2022
RIBA Stage 3 – Spatial Co-ordination (incl. Planning Application)	September 2022 – May 2023
Delivery Activity (subject to planning & delivery funding)	
RIBA Stage 4 – Technical Design	November 2023
RIBA Stage 5 – Construction **	Spring 2024
RIBA Stage 6 – Handover	Spring 2025

**It should be noted that some investigation works to the Sheave Wheel is expected to be carried out during RIBA Stage 2 period.

Resource Specification

The consultant will have a track record of working successfully in the heritage sector. They should have experience of projects with trusts and foundations. They should also be experienced in projects which expect high level of sustainability such as this scheme.

The consultant should have an understanding of the project and the drivers leading to a successful scheme. They should also understand the likely challenges during the life of the project and how to mitigate them.

Deadline

Completed tenders should be returned by 5 pm on [5th May 2022] to [luke.brown@projectsurveyors.com]. No questions will be accepted after 5 pm [28th April 2022]. It is the Tenderer's responsibility to ensure that they are received on time. Clarification interviews will be held on [w/c 16th May] it is expected that the proposed delivery lead will be in attendance at the interview, we reserve the right to not invite all bidders to interview stage.

Fee

The fee for the Development Phase of work must not exceed £10,000 excluding VAT. This must include all expenses.

The fee for the Delivery Phase of work must not exceed £15,000 excluding VAT. This must include all expenses.

Insurance

The MEP Services Engineer will hold Professional Indemnity cover set at £2M, Public Liability at £5M and Employer's Liability at £10M.

Tender submissions – please read carefully

The purpose of the tender response is to enable the Trustees to evaluate your understanding of our requirements, the suitability of your proposed approach and experience and skills of your team. Your response should consist of the following:

- A written response to the evaluation criteria below.
 - a. Ensure your responses relate to the project brief. Do not include generic information. Any general marketing material about your company or additional appendices that have not been requested will not be considered.
 - b. If you are tendering for more than one Lot ensure each response is a separate document.
- A priced offer in the format request.
 - a. It is the Tenderer's responsibility to ensure all fees, rates and prices quoted are correct. Tenderers will be required to hold these or withdraw their tender in the event of errors being identified after the submission of tenders.
 - b. If a Tenderer fails to provide fully for the requirements of the specification in the tender it must either absorb the costs of meeting the full requirements of the specification within its tendered price, or withdraw the tender.
 - c. No tender will be considered which is late, for whatever reason nor will changes be permitted after the closing date.

- d. All tenderers shall keep their respective Forms of Tender valid and open for acceptance by the Trustees or 90 days from receipt.
- Signatures of appropriately authorised individuals e.g. where the tender is a Limited Company, by a Director; where it is a Partnership, by two authorised partners or by an individual if they are a sole trader. Signatures can be scanned.
- Evidence of appropriate insurances. All consultants should have Public and Professional Liability and Companies Employer's Liability if they have employees.

Evaluation criteria

Tenders will be evaluated according to the following criteria, 70% quality and 30% price.

Quality will be broken down as follows.

- Relevant experience of involvement in projects:
 - Experience and examples of heritage projects, any relevant challenges encountered and how they have been approached/mitigated. *(Max 1000 words 20% weighting)*
 - Experience and involvement in community led projects with public interest and experience of working with CIC's/CIO's. Please describe any challenges you faced and how these were overcome. Please also comment on any challenges you foresee with the Leas Lift project and how these will be mitigated. If you do not have experience of working on these type of projects please describe your approach (with demonstrable examples). *(Max 1000 words 20% weighting)*
 - Experience of previous National Lottery Heritage Fund or similar grant fund work which involved intense monitoring and reporting requirements. *(Max 500 words 10% weighting)*
- Programme – please provide a design programme using the timetable dates provided earlier in the ITT. Your programme should consider your discipline specific design activities as well as any required investigations or approvals you deem necessary. *(Max 2 sides of A3 20% weighting)*
- Sustainability - How would you make the lift environmentally sustainable, whilst considering the constraints of its heritage designation? *(Max 1000 words 20% weighting)*
- Proposed Delivery Team – Please provide CV's of the proposed delivery team listing their applicable experience and skills. *(Max 3 CV's 10% weighting)*

The Directors will assess Tenderers' responses according to these criteria and will award points up to the maximum shown against each heading in the Quality evaluation assessment table below. Failure to achieve a rating of satisfactory (i.e. a minimum unweighted score of 3 or above) in any one or more categories may result in the bid being disqualified at the Directors' discretion.

Assessment Criteria	Score
Unacceptable: either no answer is provided, or the answer fails to demonstrate that any of the CIO's key requirements in the area being measured will be delivered.	0
Poor: fails to demonstrate how the CIO's basic requirements in the area being measured will be addressed, giving rise to serious concerns that acceptable outcomes would not be delivered against the project brief.	1
Weak: barely demonstrates how the CIO's basic requirements in the area being measured will be addressed, giving rise to concerns whether acceptable outcomes would be delivered against the project brief.	2
Satisfactory: demonstrates how the CIO's basic requirements in the area being measured will be addressed so as to deliver acceptable outcomes against the project brief.	3
Good: demonstrates how most of the CIO's requirements in the area being measured will be addressed so as to deliver good outcomes against the project brief.	4
Excellent: demonstrates clearly how all of the CIO's requirements in the area being measured will be fully addressed so as to deliver excellent outcomes against the project brief.	5

Please note the following:

The tenderer who submits the lowest overall price will receive the full score of 30% available for the financial evaluation. Remaining bids will be awarded a score proportionate to the lowest priced bid according to the following formula:

$$\text{Score} = (\text{lowest bid received} / \text{bid price}) \times 30$$

Abnormally low or high bids distort evaluation of tenders and where the CIO feels that a bid falls into one of these categories the tender will be asked to explain or clarify their bid. This includes the discounting of daily rates.

Please note the following:

Preparation of Tender

Tenderers are responsible for obtaining all information necessary for the preparation of their response; and all costs, expenses and liabilities incurred in connection with the preparation and submission of the Tender and attending any interviews will be borne by the Tenderer.

The Tenderer is expected to have carried out all research, investigations and enquiries which can reasonably be carried out and to have satisfied itself as to the nature, extent, and character of the requirements of the Contract (in the context of and as it is described in the Specification), the extent of the materials and equipment which may be required and any other matter which may affect its Form of Tender.

Tenderers may seek clarification on any of the points contained in the tender documents at any time **prior to seven working days** before the date for receipt of tenders. This will allow time for the Directors or Project Manager to prepare a response to all tenderers by five days before the tender deadline and for all tenderers to incorporate the clarification prior to the tender deadline.

Non-consideration of Form of Tender

The Directors reserve the right not to award the contract to the highest scoring, lowest priced or to any tenderer; and reserve also the right to accept any of the same in whole or in part. The Directors may also refrain from considering any Form of Tender if it is not in accordance with the Form and Conditions of Tender, or the Tenderer does not provide all of the information required or attempts to make variation or alterations to the Form of Tender, Conditions of Contract or the Specification.

Tenderer's Warranties

In submitting a Tender, the Tenderer warrants that:

- It has not done any of the acts in the Non-Consideration of Form or Tender,
- all information provided is true, complete and accurate in all respects including details of previous projects being presented as examples,
- it has full power and authority to enter into the Contract.
- it is of sound financial standing, and
- its partners, directors and employees are not aware of any circumstances that may adversely affect such financial standing in the future.

Confidentiality

The Form of Tender, the Conditions of Contract, the Specification, and all other documentation or information issued by the Directors relating to the Tender shall be treated by the Tenderer as private and confidential for use only in connection with the Tender and any resulting contract and shall not be disclosed in whole or in part to any third party without the prior written consent of the Directors.

The documents which constitute the project and all copies thereof are and shall remain the property of the Directors (whether or not the Directors shall have charged a fee for the supply of such documents) and must not be copied or reproduced in whole or in part and must be returned to the Directors upon their request.

All information provided by tenderers as part of a tender return will be treated as confidential.

Freedom of Information

Information in relation to this tender may be made available on demand in accordance with the requirements of the Freedom of Information Act 2000.

Tenderers should state if any information supplied by them is confidential or commercially sensitive or should not be disclosed in response to a request for information under the Act, and should state why they consider the information to be confidential or commercially sensitive.

This will not guarantee that the information will not be disclosed, but will be examined in the list of the exemptions provided in the Act.

APPENDIX A: Form of Tender

Please complete this form and include it with your responses to the questions above.

Project: Leas Lift – Restoring Folkestone’s Gem for the community

Professional Service: MEP Services Engineer

Name of Tenderer:

I/We, the undersigned, do hereby offer to execute and complete the above mentioned professional services in strict accordance with the Schedule of Services for the following lump sum fee:

£ ____ plus VAT (delete if VAT not applicable) for the development phase (RIBA Stage 2 to 3)

Confirm figure in words: _____ plus VAT (delete VAT if not applicable)

£ ____ plus VAT (delete if VAT not applicable) for the delivery phase (RIBA Stage 4 to 6)

Confirm figure in words: _____ plus VAT (delete VAT if not applicable)

£ ____ plus VAT (delete if VAT not applicable) for total project (RIBA Stage 2 to 6)

Confirm figure in words: _____ plus VAT (delete VAT if not applicable)

Resources

Please state the number of days intended for the Development Phase:

Please state the number of days intended for the Delivery Phase:

Day Rates

Team	Day Rate (£)
Director/ Partner	
Senior Consultant	
Consultant	
Other – specify _____	

The above day rates will be utilised to negotiate any additional works that may be required if deemed to be beyond the reasonable scope of the works specified. All day rates are to be based on a 7.5 hour day and are to include allowance for disbursements.

Expenses and Disbursements

The fee offer is to include all expenses and disbursements (including printing charges).

Offer Period

This tender/ offer is to remain open for a period of 90 days from the date fixed to the return of tenders.

Dated this _____ day of _____ 20____

	Tenderer to provide responses. Some are pass/ fail
Name of firm or company	
Postal address	
Registered address (if applicable)	
Company number (if applicable)	
Please indicate if you are: a sole trader, partnership, Public or Private Limited Company or other type of organisation	
Main contact	
Contact telephone number	
Contact email address	
Please indicate your level of Employer's Liability Insurance, the policy number and expiry date ¹	
Please indicate your level of Public Indemnity Insurance, the policy number and expiry date	
Please indicate your level of Professional Indemnity Insurance, the policy number and expiry date	
Signature of authorised person	
Name of authorised person	
Capacity in which signed	

¹ If you do not have any of these insurances, please indicate if you will purchase them if awarded the contract. If they are not applicable e.g. you are not an employer, please indicate this.

Appendix B: Schedule of Services

Please note: the below scopes reference tick boxes to indicate if a service is required, to avoid ambiguity all services detailed on the following pages are required by the selected consultant.

2.2 Preparation and Brief – Stage 1

The placing of a tick in a tickbox before a service or deliverable indicates that the relevant service or deliverable is to be carried out or provided (as applicable). Other bespoke deliverables may be agreed and added in the text boxes provided. Only ticked items will be visible in the printable version of this schedule.

- 2.2.1 Seek confirmation of the level of detail required for the Tender Documentation.
- 2.2.2 Seek the Brief and instructions from the Client or the Client's authorised representative describing the Client's requirements in respect of the Works, what they are intended to achieve, their cost and programme.
- 2.2.3 Discuss with the Client the role of the Consultant and the Client's relationship with the Lead Consultant if appointed and any Other Consultants, the various Contractors and sub-contractors and any Principal Designer appointed in accordance with the Construction (Design and Management) Regulations 2015.
- 2.2.4 Discuss with the Client the Client's duties in accordance with the Construction (Design and Management) Regulations 2015.
- 2.2.5 Discuss with the Client and agree methodology to enable the Client to identify, allocate and record design and other responsibilities for all matters related to the Works.
- 2.2.6 Discuss with the Client and agree the procurement method for the Works and/or the Project including the type of construction contract and the timing of tender activities in relation to the various Stages of the design.
- 2.2.7 Discuss with the Client and agree the submissions and approvals required of statutory authorities.
- 2.2.8 Discuss with the Client the likely requirements for Site Staff; these shall be considered again prior to and following the appointment of Contractors.
- 2.2.9 Seek from the Client all information and data relevant to the Project that is in the possession and control of the Client.
- 2.2.10 Review such information as is reasonably available from existing data on the existence and extent of relevant public services such as water, gas, electricity, foul and surface water drains and sewers, and telecommunications services. Comment to the Client on any effect that these may have on the Works, both during construction of the Works and on completion.
- 2.2.11 Comment to the Client on any physical site restrictions which may affect the engineering options for the Works.
- 2.2.12 Collaborate with the Lead Consultant if appointed and any Other Consultants in seeking from the Client any further information needed so that they can perform their services under their various agreements with the Client.
- 2.2.13 Collaborate in making initial recommendations to the Client on the technical viability of the Works.
- 2.2.14 Assess and, in collaboration with the Principal Designer and Other Consultants, make any relevant observations and recommendations with regard to health and safety risks in or arising from the Works and/or the Project or in any existing health and safety file.
- 2.2.15 Discuss and agree with the Principal Designer and Other Consultants how health and safety information will be exchanged.
- 2.2.16 Discuss with the Client and agree whether Building Information Modelling is to be utilised in the production of information and if so agree any appropriate protocol.
- 2.2.17 Seek confirmation from the Client on whether:
 - a) any of the Additional Services by the Consultant listed in Part 3 or any of the Services that may be arranged by the Consultant listed in Part 4 are required; or
- 2.2.18 Seek the Client's consent to proceed to the concept design Stage.
- 2.2.19 Deliverables for Stage 1

Core Deliverables (*Details of requirements for models and drawings are contained at Appendix 1.*)

- i. Provide or obtain written confirmation of Client's Brief and instructions.

- ii. Provide an information delivery plan for deliverables at each Stage to an agreed information exchange format.

Optional Deliverables

- i. Provide initial Works and/or Project brief.
- ii. Provide initial design programme.
- iii. Provide assessment of significant risks from any existing Health and Safety file.

2.3 Concept Design – Stage 2

The placing of a tick in a tickbox before a service or deliverable indicates that the relevant service or deliverable is to be carried out or provided (as applicable). Other bespoke deliverables may be agreed and added in the text boxes provided. Only ticked items will be visible in the printable version of this schedule.

After receiving the Client's consent to proceed to the concept design Stage

- 2.3.1 Visit the Site as appropriate and study data and information relating to the Project and relevant to the Works which are reasonably accessible to the Consultant, and consider reports relating to the Works which have either been prepared by the Consultant or have been prepared by others and made available to the Consultant by the Client.
- 2.3.2 Liaise as may be necessary with any Other Consultants to agree a programme for the whole of the design and indicative programme information for construction activities and handover strategy for the Project.
- 2.3.3 Liaise and share information as may be necessary with the Principal Designer, Other Consultants and any Contractors or sub-contractors in order to seek to address any health and safety risks arising out of the concept design Stage.
- 2.3.4 Advise the Client on the need for arrangements to be made for and define the extent of topographical and dimensional surveys of the Site or surveys to obtain details of construction and/or installed building services in existence on or adjacent to the Site, special investigations or tests.
- 2.3.5 Where appropriate consult any local or other authorities about matters of principle in connection with the design and construction of the Works.
- 2.3.6 Consider alternative outline solutions for the Works.
- 2.3.7 Develop the Client's Brief into a full Brief for the Works in consultation with the Client and any Other Consultants. Such Brief shall describe the Client's performance and information requirements in respect of the Services and both the Client and the Consultant shall work to the Brief. Discuss and agree with the Client any changes to the arrangements for payments to be made to the Consultant which may have become necessary as a result of changes to the Brief. Comment to the Client on any restrictions the Brief may impose on any future use of the Works suggested by the Client.
- 2.3.8 Receive from the Client or Other Consultants on the Client's behalf an update on the thermal performance standards for the building envelope and details of any external shading/solar control. Analyse the preliminary heat gains and losses for the purpose of developed sizing of the MEP engineering services.
- 2.3.9 Provide information to allow Other Consultants to provide a concept stage Cost Plan based upon floor area, building type or similar approximate estimating methodologies.
- 2.3.10 Present the concept design information to the Client, in conjunction with Other Consultants as required, in a format that

Core Deliverables (*Examples of the requirements for any information referred to in the deliverables are contained at Appendix 1*)

- i. Provide concept design Stage report relating to MEP engineering matters within the scope of the Services, including the following:
 - a. recommendations for renewable energy sources
 - b. considerations for off-site manufacture
 - c. Building Control requirements
 - d. preliminary assessment of loads
 - e. noise and acoustic impact
 - f. fire and smoke control systems
 - g. adequacy of utilities supplies
 - h. constraints arising from the Brief or local authority policy
 - i. High level metering strategy.
- ii. Provide concept design information including appropriate spatial and geometric detail and object information.
- iii. Provide concept design Builders' Work Requirements as applicable.

Optional Deliverables

- i. Provide outline performance information for tendering MEP services, if required, depending on procurement strategy.
- ii. Provide information for concept design Stage life-cycle cost and life-cycle assessment studies.
- iii. Provide concept stage Cost Plan for building services based on floor area, building type or similar approximate estimating methodology.
- iv. Provide preliminary energy statement for planning submission, where required by the planning authority.
- vi. Provide preliminary estimate of in-use energy consumption.

2.4 Developed Design – Stage 3

After receiving the Client's consent to proceed to the developed design Stage

- 2.4.1 Review the information agreed to be provided at this Stage in the context of the procurement method.
- 2.4.2 As applicable
Where traditional procurement has been selected, consider the scope of required Contractor's design and how this responsibility will be captured within both the Tender Documentation and subsequent contract.
- 2.4.3 Review allocation of design and other responsibilities with the Client, agree and record any changes from previously agreed allocations in order to enable the Client to communicate the same to all relevant parties involved in the Project or the Works as appropriate.
- 2.4.4 Provide indicative illustrations of the level of graphical detail and non-graphical information to be prepared to meet the overall purpose of the information to be issued at this Stage. Examples are provided in Appendix 1 for information delivery in either drawing or model-based format.
- 2.4.5 Align with RIBA work stage requirement to prepare developed design, including coordinated and updated proposals for structural design, building services systems, outline specifications, cost information and project strategies in accordance with design programme.
- 2.4.6 Develop the design proposals for the MEP engineering services in collaboration with any Other Consultants, Contractor, sub-contractors or specialists that have been appointed at this Stage.
- 2.4.7 Provide input to Other Consultants to enable them to update the programme for the design and indicative programme information for construction activities and handover strategy of the Works.
- 2.4.8 Provide information indicating the planning requirements for the MEP engineering services showing locations and approximate sizes of plant rooms, major items of plant, major ducts/chimneys and service runs and provide the approximate size and weight of any item affecting the structural design.
- 2.4.9 Provide information to indicate to any Other Consultants the developed Builders' Work Requirements in connection with the MEP engineering services.
- 2.4.10 Receive from the Client or Other Consultants on behalf of the Client an update on the thermal performance standards for the building envelope and details of any external shading/solar control. Analyse the preliminary heat gains and losses for the purpose of developed sizing of the MEP engineering services.
- 2.4.11 Assess MEP engineering services system loads as applicable and prepare developed load schedules.
- 2.4.12 Agree and document with the appropriate utility providers the works required for provision of necessary incoming services.
- 2.4.13 Prepare such calculations or certification and details relating to the Works as may be required to for inclusion within the submission by others to any appropriate statutory authority, excluding any submissions or applications for planning consent or approval.
- 2.4.14 Provide information to enable others to update the Cost Plan.
- 2.4.15 Provide information to enable the Lead Consultant to co-ordinate and complete the developed design Stage.
- 2.4.16 Provide input to the Lead Consultant for the development of the maintenance and operational and handover strategies.
- 2.4.17 Provide input to the Principal Designer for the development of construction and health and safety strategies.
- 2.4.18 Liaise and share information as may be necessary with the Principal Designer, Other Consultants and any Contractors or

sub-contractors in order to seek to address any health and safety risks arising out of the developed design Stage.

- 2.4.19 Provide input to enable the Lead Consultant or Other Consultant as applicable to complete the developed design Sustainability Checkpoint.
- 2.4.20 Present the developed design information to the Client, in conjunction with Other Consultants as required, in a format that highlights key points and identifies significant changes to concept design proposals.
- 2.4.21 Seek the Client's approval of the developed design proposals and agreement to produce Tender Documentation or to proceed to technical design Stage 4, as required by the Client's selected procurement process.
- 2.4.22 Where tender action is taking place, carry out the following activities:
 - i. Advise the Client on the need for any special conditions of contract relevant to the Works or on appropriate forms of contract and invitations to tender for the Works.
 - ii. Advise the Client as to the suitability for carrying out the Works of persons and firms to be invited to tender for any contract involving the construction, supply and/or installation of all or part of the Works.
 - iii. Prepare a package of developed design information in accordance with agreed schedule of deliverables for inclusion in Tender Documentation to enable tender action by others.
 - iv. Assist the Client and/or any Other Consultants in assembling the Tender Documentation.
 - v. Assist any Other Consultant in advising the Client as to the relative merits of tenders, prices and estimates received for execution of all or part of the Works.

2.4.23 Deliverables for Stage 3

Core Deliverables (*Examples of the requirements for any information referred to in the deliverables are contained at Appendix I*)

- i. Provide a developed design report including the following in connection with the MEP engineering services:
 - a. constraints arising from the Brief, Local Authority policy or other external factors.
 - b. recommendations for renewable energy sources.
 - c. considerations for efficient construction methodology including off-site manufacture.
 - d. Building Control requirements.
 - e. assessment of building services loads.
 - f. acoustic noise and vibration impact.
 - g. fire and smoke control issues.
 - h. adequacy of utilities supplies
 - i. high-level metering strategy.
- ii. Provide developed design information in accordance with the agreed schedule of deliverables and at the agreed level of graphical detail and non-graphical information.
- iii. Provide updated schedule of developed design Builders' Work Requirements.
- iv. If the procurement method requires, provide Tender Documentation based on developed design suitable for inclusion in the competitive tender package to obtain Contractors' proposals.
- v. If the procurement method requires, provide tender report.

Optional Deliverables

- iii. Provide report on adequacy of existing MEP to incorporate proposed extended or refurbished works, to a pre-agreed level of intrusion and physical testing if applicable.
- vii. Provide developed estimate of in-use energy consumption.
- viii. Provide developed energy statement for planning submission, based on agreed energy strategy.
- ix. Provide any information (over and above that which is already contained in the developed design information) that is required in connection with any application for planning permission including reviews and/or appeals where applicable.
- x. Provide report on any quotations received for equipment that needs to be selected at this Stage to meet particular Works requirements.
- xi. Provide competitive tender package including Tender Documentation provided by the Consultant and any Other Consultants.

2.5 Technical Design – Stage 4

The placing of a tick in a tickbox before a service or deliverable indicates that the relevant service or deliverable is to be carried out or provided (as applicable). Other bespoke deliverables may be agreed and added in the text boxes provided. Only ticked items will be visible in the printable version of this schedule.

After receiving the Client's consent to proceed to the technical design Stage

- 2.5.1 Review the information agreed to be provided at this Stage in the context of the procurement method.
- 2.5.2 Review options for allocation of design and other responsibilities with the Client, including alignment with the information agreed to be provided by the Consultant at this stage, agree and record changes to previous allocations, if any, in order to enable the client to communicate the same to all relevant parties involved in the Project as appropriate.
- 2.5.3 **As applicable**
Where traditional procurement is the chosen method, provide a summary of the level of development of the information to be delivered at tender stage to assist Other Consultants in understanding the requirement for the appointed Contractor to provide further information regarding MEP engineering services at an increased level of development within the overall scope of RIBA Stage 4.
- 2.5.4 Align with RIBA work stage requirement to prepare technical design, including co-ordinated and updated information for structural design, building services systems, outline specifications, cost information and project strategies in accordance with design programme.
- 2.5.5 Provide indicative illustrations of the level of graphical detail and non-graphical information to be prepared to meet the overall purpose of the information to be issued at this Stage. *(Examples are provided in Appendix 1 for information delivery in either drawing or model-based format.)*
- 2.5.6 Where a Contractor has been appointed to provide technical design services under a design and build procurement, examine information provided by the appointed specialist contractor throughout this Stage and comment on compliance

- with the requirements of information issued for tender at the end of Stage 3.
- 2.5.7 Develop the technical design to the agreed level of graphical detail and non-graphical information for the MEP engineering services suitable for tender action in collaboration with any Other Consultants, Contractors or specialists that have been appointed at this Stage.
 - 2.5.8 Provide input to Other Consultants to enable them to update the programme for the design and indicative information for construction activities and handover strategy of the Works.
 - 2.5.9 Assemble and provide summaries of all information obtained from the appropriate utility providers in connection with provision of necessary incoming services, to enable the procurement of such incoming services to be carried out by others.
 - 2.5.10 Provide updated information to indicate to others the Builders' Work Requirements in connection with the MEP engineering services up to tender stage, based upon which the Builders' Work Details can be prepared.
 - 2.5.11 Provide information to enable others to update the Cost Plan.
 - 2.5.12 Provide information to enable the Lead Consultant or Other Consultants as applicable to co-ordinate the various disciplines and complete the technical design up to tender stage within Stage 4.
 - 2.5.13 Provide input to the Lead Consultant for the development of the maintenance and operational and handover strategies up to tender stage within Stage 4.
 - 2.5.14 Provide input to the Principal Designer for the development of construction and health and safety strategies up to tender stage within Stage 4.
 - 2.5.15 Liaise and share information as may be necessary with the Principal Designer, Other Consultants and any Contractors or sub-contractors in order to seek to address any health and safety risks arising out of the technical design Stage.
 - 2.5.16 Provide input to enable the Lead Consultant or Other Consultant as applicable to complete the technical design Sustainability Checkpoint up to tender stage within Stage 4.
 - 2.5.17 Prepare such calculations or certification* and details relating to the Works as may be required to for inclusion in submission by others to any appropriate statutory authority, excluding any submissions or applications for planning consent or approval.
 - 2.5.18 Present the pre-tender technical design information to the Client, in conjunction with Other Consultants as required, in a format that highlights key points and identifies significant changes to developed design proposals.
 - 2.5.19 If applicable depending on the selected procurement process, seek the Client's approval of the pre-tender technical design proposals and agreement to produce Tender Documentation.
 - 2.5.20 Where tender action is taking place, carry out the following activities
 - i. Advise the Client on the need for any special conditions of contract relevant to the Works or on appropriate forms of contracts in invitations to tender for the Works.
 - ii. Advise the Client as to the suitability for carrying out the Works of persons and firms to be invited to tender for any contract involving the construction, supply and/or installation of all or part of the Works.
 - iii. Prepare a package of developed design information in accordance with agreed schedule of deliverables for inclusion in Tender Documentation to enable tender action by others.
 - iv. Assist the Client or any Other Consultants in assembling the Tender Documentation for issue to firms selected to tender.
 - v. Assist any Other Consultant in advising the Client as to the relative merits of tenders, prices and estimates received for execution of all or part of the Works.
 - 2.5.21 Seek the Client's consent to proceed to Stage 5.
 - 2.5.22 Deliverables for Stage 4

Core Deliverables (Examples of the requirements for any information referred to in the deliverables are contained at Appendix 1)

- i. Provide a technical design report on MEP engineering services, up to the level of tender stage information, as an update to the developed design Stage 3 report.
- ii. Provide technical design information up to tender stage in accordance with the agreed schedule of deliverables and at the agreed level of graphical detail and non-graphical data.
- iii. Provide updated schedule of technical design Builders' Work Requirements at pre-tender stage.
- iv. Provide commissioning and handover specification.
- v. If the procurement method requires, provide Tender Documentation based on technical design suitable for inclusion in the competitive tender package to obtain contractors' proposals.
- vi. If the procurement method requires, provide tender report.

Optional Deliverables

- ii. Provide information for whole-life cost studies.
- xii. Provide Builders' Work Details based on Installation Information.

2.6 Construction – Stage 5

The placing of a tick in a tickbox before a service or deliverable indicates that the relevant service or deliverable is to be carried out or provided (as applicable). Other bespoke deliverables may be agreed and added in the text boxes provided. Only ticked items will be visible in the printable version of this schedule.

After receiving the Client's consent to proceed to the construction Stage

- 2.6.1 Examine Installation Information, Fabrication Information and Builders' Work Details submitted by Contractors and/or sub-contractors for the Works or parts thereof, in respect of the design intent and compliance with performance criteria. The Consultant shall not be required to examine the design of any proprietary products manufactured or supplied by Contractors or sub-contractors or to alter the Consultant's design to suit Contractors', sub-contractors' or suppliers' information without instruction by the Client of an Additional Service in accordance with the appropriate provision in Part 3.
- 2.6.2 Examine Installation Information, Fabrication Information and Builders' Work Details submitted by Contractors and/or sub-contractors for the Works or parts thereof in order to assess any health and safety issues.
- 2.6.3 Advise the Client on the need for special inspections or tests arising during the construction of the Works.
- 2.6.4 Advise on the appointment and duties of Site Staff and, where they have been appointed, instruct Site Staff where applicable in accordance with the terms of the appointment agreement.
- 2.6.5 Assist in examining Contractors' and/or sub-contractors' technical proposals, including supplier selections, as may be required by contracts for the Works other than the consideration of alternative designs for the Works submitted by Contractors and/or sub-contractors or any relevant Additional Services in Part 3.
- 2.6.6 Attend relevant Site meetings and make other periodic visits to the Site as stated in the appointment agreement to assist the Client to monitor that the Works are being executed generally in accordance with the contract documents and with good engineering practice and advise the Client on the need for instructions to Contractors.
- 2.6.7 Provide technical advice to the Client on certificates for payment to Contractors in respect of the Works and provide technical information to any Other Consultant to enable accounts for the Works to be agreed.
- 2.6.8 Perform any services which the Consultant may be so required to do under any contract for the execution of the Works including where appropriate the witnessing of any specified tests, provided that the Consultant may decline to perform any services specified in a contract, the terms of which have not been approved by the Consultant.
- 2.6.9 Examine the proposals of Contractors or sub-contractors for carrying out commissioning procedures and performance testing in relation to the Works. Comment to the Client on any impact of any requirements of these proposals on the Works, including on the programme for the Works.
- 2.6.10 Subsequent to setting to work and regulation of the buildings, plant and equipment of the Works by Contractors and sub-contractors, examine the results of commissioning and the documentary records thereof.
- 2.6.11 Examine the proposals of Contractors or sub-contractors for carrying out user training relating to building systems.
- 2.6.12 Agree the timetable for any aftercare service at the in-use Stage – Stage 7.
- 2.6.13 Seek the Client's consent to proceed to Stage 6.
- 2.6.14 Deliverables for Stage 5

Core Deliverables

- i. Provide site visit reports.
- ii. Provide comments on proposals submitted by Contractors and/or sub-contractors.
- iii. Provide notes from meetings.
- iv. Provide comments on programmes within the agreed scope.
- v. Provide comments on draft Record Information and operating and maintenance manuals.

2.7 Handover and Close Out – Stage 6

- 2.7.1 Inspect the Works on completion and, in conjunction with any Site Staff, record and report on observed defects.
- 2.7.2 Receive and comment on copies of Record Information, operating instructions and maintenance manuals prepared by Contractors or sub-contractors if so required under their contracts for construction.
- 2.7.3 Seek the Client's consent to proceed to Stage 7 (if instructed).
- 2.7.4 Deliverables for Stage 6

Core Deliverables

- i. Provide comments on Record Information and operating and maintenance manuals.
- ii. Provide report on any observed defects.

2.8 In Use – Stage 7

(Note that there are a number of Additional Services in Part 3 (clauses 3.36 & 3.37) that may be instructed in relation to Soft Landings and Post-Occupancy Evaluation, where instructed in accordance with clause 2.2.17.)

The placing of a tick in a tickbox before a service or deliverable indicates that the relevant service or deliverable is to be carried out or provided (as applicable). Other bespoke deliverables may be agreed and added in the text boxes provided. Only ticked items will be visible in the printable version of this schedule.

After receiving the Client's consent to proceed to the in use Stage

- 2.8.1 Inspect Works on completion of the Contractor's defects liability period and, in conjunction with any Site Staff, record and report on observed defects.
- 2.8.2 Deliverables for In Use Stage 7

Core Deliverables

- i. Provide reports associated with the selected duties listed.