



Professional Services
Architect Led Design Team for
Land Development Agency

Framework Scope of Services

September 2020

Table of Contents

1	Services Required.....	4
1.1	Overview	4
1.2	Safety, Health & Welfare	4
1.3	Building Control (Amendment) Regulations 2014	4
1.4	Team Disciplines.....	6
1.5	Drawing Deliverables	12
1.6	Specialist Services	12
1.7	Project Stages.....	13
2	Stage 1a – Feasibility, Urban Design / Masterplan & Outline Design Stage	15
2.1	Architectural Services and Architectural Services – Masterplan and Urban Designer	15
2.2	Mechanical & Electrical Services.....	16
2.3	Quantity Surveyor Services	18
2.4	Civil & Structural Engineering Services	18
2.5	Landscape Architectural Services.....	20
2.6	Project Supervisor Design Process (Health & Safety PSDP) Services	20
2.7	Planning and Environmental Consultancy Services	21
2.8	Traffic & Transport Services	22
2.9	Archaeology Consultancy Services.....	23
3	Stage 1b – Preliminary Design and Planning Application Stage	25
3.1	Architectural Services	25
3.2	Architectural Services – Masterplan and Urban Designer	25
3.3	Mechanical & Electrical Engineering Services.....	26
3.4	Quantity Surveyor Services	27
3.5	Civil & Structural Engineering Services	27
3.6	Landscape Architectural Services.....	28
3.7	Project Supervisor Design Process (Health & Safety PSDP) Services	28
3.8	Planning and Environmental Consultancy Services	29
3.9	Traffic & Transport Services	30
3.10	Archaeology Consultancy Services.....	30
4	Stage 2 – Detailed Design and Statutory Approvals	31

4.1	Architectural Services	31
4.2	Quantity Surveyor Services	32
4.3	Mechanical & Electrical Engineering Services.....	33
4.4	Civil & Structural Engineering Services	35
4.5	Landscape Architectural Services.....	36
4.6	Project Supervisor Design Process (Health & Safety PSDP) Services	37
4.7	Planning and Environmental Consultancy Services	37
4.8	Traffic & Transport Services	38
4.9	Archaeology Consultancy Services.....	38
4.10	Assigned Certifier	39
4.11	Design and Ancillary Certifier(s).....	39
5	Stage 3 – Tender Action, Evaluation, Award.....	40
5.1	Architectural Services	40
5.2	Mechanical & Electrical Engineering Services.....	40
5.3	Quantity Surveying Services.....	40
5.4	Civil & Structural Engineering Services	42
5.5	Landscape Architectural Services.....	42
5.6	Project Supervisor Design Process (Health & Safety PSDP) Services	42
5.7	Planning and Environmental Consultancy Services	43
5.8	Traffic & Transport Services	43
5.9	Archaeology Consultancy Services.....	43
6	Stage 4 – Construction	44
6.1	Architectural Services	44
6.2	Mechanical & Electrical Engineering Services.....	46
6.3	Quantity Surveying Services.....	47
6.4	Civil & Structural Engineering Services	48
6.5	Landscape Architectural Services.....	50
6.6	Project Supervisor Design Process (Health & Safety PSDP) Services	51
6.7	Planning and Environmental Consultancy Services	51
6.8	Traffic & Transport Services	51
6.9	Archaeology Consultancy Services.....	51

6.10	Assigned Certifier	51
7	Stage 5 – Handover and Defects Period	53
7.1	Architectural Services	53
7.2	Mechanical & Electrical Engineering Services.....	53
7.3	Quantity Surveying Services.....	54
7.4	Civil & Structural Engineering Services	54
7.5	Landscape Architectural Services.....	54
7.6	Project Supervisor Design Process (Health & Safety PSDP) Services	55
7.7	Planning and Environmental Consultancy Services	55
7.8	Assigned Certifier	56
7.9	Multi-Disciplinary Services on Handover	56
7.10	Final Account Report Supplement	56
8	General Services for All Stages.....	57
8.1	Fire Safety Engineering	57
8.2	Disability Access Engineering	61

1 Services Required

1.1 Overview

This scope of the services document covers the feasibility, master-planning, preliminary design, planning application, detailed design, procurement of works contractor(s), contract administration, works supervision and handover of Project Stages of the project summarised in Section 1.6 and more particularly described in Sections 2 to 7.

The Architect Led ALDT (“ALDT”) will be responsible for providing all planning and construction-related technical advice, including Master-planning design services to the Contracting Authority A (“CA”) in respect of the project.

The ALDT will be required to liaise with the CA’s Project Manager, Property Advisor and other relevant appointed consultants, as required in the delivery of their services. The ALDT will be required to progress site feasibility studies, design studies and master planning demonstrating vision while being sensitive to the surrounding environment. The ALDT consultants will be required to provide services included in this Scope of Services document for the Project Stages.

The consultant team must perform their duties professionally, adequately, efficiently and in accordance with best practice and ethics to achieve the outputs required.

The consultant team must carry out all works in accordance with the current applicable procedures as set out in the Capital Works Management Framework documents as set out by Department of Public Expenditure and Reform and in compliance with EU and Irish legislation.

This Scope of Services document is to be read in conjunction with the Outline Brief and the Tender documents issued with the relevant request for mini-tender.

1.2 Safety, Health & Welfare

The ALDT shall address all issues related to health and safety that may be associated with the design and works and shall perform its duties in accordance with the Safety, Health and Welfare at Work Act 2005 and the Safety, Health and Welfare at Work (Construction) Regulations 2013, including the oversight of all CA obligations under the regulations. All ALDT members shall provide timely inputs into all necessary health, safety & welfare documentation including design risk assessments, preliminary and final health and safety plans and review of risk assessments and method statements.

1.3 Building Control (Amendment) Regulations 2014

Carry out the role of Design and Assigned Certifier and associated duties as required under the Building control (amendment) Regulations 2013-S.I. No 80 of 2013, S.I. No 9 of 2014 or any subsequent update in line with the agreed format of the ancillary certs and in accordance with Code of Practice for Inspecting and Certifying Buildings and Works; Building Control Regulations 2014

As a minimum this should include:

- Liaise with Employer, Project Manager and Design Team to understand the history, status and delivery programme for the project,
- Liaise with Employer, relevant Stakeholders, Project Manager and appointed Consultants / Contractors to deliver the Service,
- Develop a methodology for implementation of the Building Control (Amendment) Regulations (BCAR) on the project
- Develop a detailed inspection plan, taking account of any phasing required for the specific project,
- Inspect, and co-ordinate the inspection activities of others during construction, and certify the building/works on completion,
- Provide, sign and lodge the relevant statutory certificates - the form of undertaking at Commencement and the Certificate of Compliance on Completion.
- Provide a Monthly Progress report for the client including elemental BCAR signoff as the project progresses, to include:
 - Update on certificates received or outstanding
 - Variance/non-conformance with the inspection plan
 - % of Inspection plan and updated live progress report of inspections

The Architect will be required to act as design certifier for the project in accordance with the Building Control (Amendment) Regulations 2014.

The Architect and sub consultants will be required to provide Ancillary Certificates for the project in accordance under the Building Control (Amendment) Regulations 2014.

The CA will act as Building Owner under the Building Control Act 2014 and be responsible for paying Commencement Notice fees.

The ALDT will exercise all reasonable skill, care, and diligence to ensure that the buildings are designed and constructed in accordance with the relevant requirements of the Building Regulations. The persons assigned by them should be competent for the work they undertake.

All ALDT members will provide services and will be responsible for undertaking all activities required by designers in accordance with the Building Control Regulations 2014 as set out in the Code of Practice for Inspecting and Certifying Buildings and Works (2014):

- (a) design their respective elements of work in accordance with the applicable requirements of the Second Schedule to the Building Regulations.
- (b) provide the Design Certifier with the necessary plans, specifications and documentation that is required for lodgement at commencement stage.
- (c) arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
- (d) as agreed with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the Design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.

- (e) notify the Assigned Certifier of their proposed inspection regime for inclusion in the overall Inspection Plan.
- (f) provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier; and
- (g) maintain records of inspection.

1.4 Team Disciplines

The ALDT services will cover the following disciplines:

1.4.1 Design Team Leader

The Architectural services consultant will be the Design Team Leader (“DTL”) for all stages and will act as the single point of contractual responsibility, with the remaining key disciplines providing collateral warranties for the benefit of the CA. The Project Architect shall take overall responsibility of the ALDT and be wholly responsible for the provision of consultancy services provided by the ALDT.

The DTL will (1) coordinate the development of all design information produced by the ALDT, ensuring the production of high quality information; and (2) coordinate the activities of individual ALDT members and staff in order to efficiently deliver the services within timeframes as agreed with the CA. A senior representative of the Project Architect will be identified as the individual responsible for ensuring the role of the DTL is effectively implemented in all tenders.

The DTL shall take all instructions from, and engage with, the CA and the CA’s appointed representatives to review CA procedures and design standards to ensure adherence by the ALDT and shall act on behalf of the CA throughout the project. The DTL shall obtain permission from the CA to start each stage of the services. The DTL shall determine lines of responsibility between all ALDT members including inputs and lines of communication, reporting formats and programme each work task for all stages. The DTL shall ensure all ALDT design information is being distributed and stored appropriately via the CA’s online electronic document management system.

Each team will be required to use a common data environment for sharing project information with the design team, the LDA and specific stakeholders. The LDA is currently using the BIM 360 platform and will develop a Folder Security Matrix for each Call-off Contract. A member of the design team either the Design Team Leader or Project Manager will be requested to purchase a package of licences for each individual project. It will be the responsibility of the DTL to ensure that all ALDT members are utilising BIM 360 in a coordinated manner and in accordance with LDA document management procedures.

The DTL will be required to support the CA in managing communications with all relevant stakeholders involved in the Project. including, inter alia, planning authorities, local authorities, utility companies, adjacent landowners, developers, management companies, neighbours, statutory bodies, government departments and resident groups. LDA to pre-approve all formal communications with statutory bodies.

1.4.2 Architectural Services

The Project Architect will be required to provide all of the professional architectural services (including the specialist skills listed below) as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project. Specialist skills required are:

- a) Conservation Architect
- b) Fire Safety Design Services
- c) Disability Access Design Services
- d) Employer's Representative for the Works Contract
- e) Assigned and Design Certifier services as defined under the Building Control (Amendment) Regulations 2014
- f) Landscaping & Visual Impact Assessment (LVIA) and Graphics (including verified views and CGIS)
- g) Topographical surveys, asbestos and Measured Building Surveys of existing buildings
- h) Acoustics
- i) Specialist building certifiers, e.g., Well Certifier
- j) Site boundary identification and verification including statutory declarations of identity where required by the CA
- k) Building Surveys where required and unless otherwise stated are part of the duties of the Architect and relevant disciplines.

1.4.3 Architectural Services - Masterplan and Urban Designer

The aim of the development is to create a vibrant and varied community to provide residential & support facilities with links to the surrounding areas. In addition, environmental improvements to ensure linkages with the surrounding locality is a further key objective with the creation of strategic urban open spaces etc.

The ALDT are required to:

- Act as consultant for the design master plan for the development of the site, to include new housing, new open spaces and new community facilities; provide such drawings, 3-D models and views and reports as required to describe the plan; and participate in public display and presentations to the relevant stakeholders
- Advise on the development and interaction with community facilities (including local retail and leisure etc.)
- Examine and make recommendations for working with the proposed mix of tenure on the lands to create a sustainable model going forward. Advise on the distribution of tenures.
- Develop an integrated urban design strategy covering local transportation, cycling, movement and parking; streetscape and the public realm; place-making; boundaries and edges; integration of features; retention of trees and enhancement of tree planting; appropriate materials and building forms.
- Identify urban design characteristics for each block/zone within the masterplan lands.
- Provide a public realm design guide for use throughout the Masterplan areas
- advise on phasing and social sustainability issues.
- consideration of residential mix, form, massing, and density
- consideration of Social Sustainability
- consideration of energy requirements and efficiencies / sustainable dwellings

- Vehicular, cycle and pedestrian access to and from the site
- Transportation, movement, and parking are to be designed, so far as possible in accordance with the Design Manual for Urban Roads and Streets (DMURS) published by the Department of the Environment.
- Designers should advise and make design proposals generally for place making and public realm improvements generally.
- Liaise with residual team members to examine impact / limitations of the scheme vis-à-vis existing utilities and services.

The Master Planning / Urban Designer will be required to work closely with all members of ALDT and the CA's appointed consultants.

1.4.4 Civil & Structural Engineering Services

The Civil/Structural Engineer shall provide all of the professional engineering services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project.

The Civil & Structural Engineer will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.5 Mechanical, Electrical & ICT Engineering

The Mechanical & Electrical Engineer shall provide all of the Mechanical, Electrical and Information Communications Technology services consultancy services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project. These services may include specialist energy design and certification services, e.g., BER, Passive, LEED, BREEAM, Wired-Score.

The M&E Engineer will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of M&E services during all project stages and to adopt an energy efficient design approach.

1.4.6 Quantity Surveyor

The QS shall provide professional quantity surveying services as necessary to comply with the Contracting Authority's (CA) instructions and to ensure a satisfactory completion of the Project. The Quantity Surveyor shall engage directly with and act on behalf of the client to ensure accurate cost planning and ongoing monitoring of expenditure to ensure that the project is executed within the approved budget.

The QS is to liaise with the design team, Project Manager (PM), Property Advisor, and relevant appointed consultants in addition to the LDA Development Manager (LDA DM) / Project Managers (LDA PM) and other LDA Stakeholders, including planning, legal, insurance and commercial advisors as required in the delivery of their services.

1.4.7 Landscape Architectural Services

The Landscape Architect shall provide all of the professional landscape architectural services as necessary to comply with the CA instructions and to ensure a satisfactory completion of the Project.

The Landscape Architect will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.8 Project Supervisor for the Design Process

The Project Supervisor for the Design Process shall provide all of the professional PSDP services as necessary to comply with their responsibilities under the Safety, Health & Welfare at Work (Construction Regulations) 2013, the CA instructions and to ensure a satisfactory completion of the Project.

The PSDP will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient approach.

1.4.9 Planning and Environmental Consultancy Services

The Planning and Environmental Consultant shall provide all of the professional services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project. Specialist skills required as follows / associated with the following:

- a) Expert planning advices
- b) Contaminated Land & Remediation Specialist / Construction & Demolition Waste Management Plan (C&D WMP)
- a) Asbestos Specialist
- b) Noise Specialist
- c) Air Quality Specialist
- d) Ecology
- e) Mammal Expert
- f) Ornithologist
- g) Sunlight and Daylight Impact Studies and Report
- h) Wind report
- i) Appropriate Assessment Screening and if required Natura Impact Statement.
- j) Environmental Impact Assessment and/or Statement
- k) Ecological Impact Assessment
- l) Bat Specialist
- m) Arborist / Tree Specialist

Note a number of physical site surveys are noted as to be procured and co-ordinated by the ALDT and the surveys reimbursed by the Contracting Authority in section 1.5 above.

The Planning and Environment Consultant will be required to work closely with the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an energy efficient.

Key tasks for the successful planning consultant during the project are:

- Arrange, chair and minute meetings with the Local Authority. Circulate the minutes of such meetings to the Client and Project Manager.
- Carry out such services as you consider necessary to maximise the Client's chances of obtaining planning permission for the development.
- Reviewing on an on-going basis the developing design to ensure that it is compatible with the requirements of the Planning Authority. Advising on areas of divergence.
- Provide a copy of the planning permission and any discharge of condition notices to the Client and Project Manager promptly.

- If required, input to the report at the completion of any work stage in advance of completion of such “work stage”.

1.4.10 Traffic & Transport Services

The Traffic & Transport Consultant shall provide all the professional consultancy services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project.

The Traffic & Transport Consultant will be required to work closely with the architect to ensure that traffic management, parking, and traffic impact considerations (including before and after analysis) are incorporated in the overall design.

The Traffic & Transport Consultant will be required to work closely with the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.11 Archaeology Services

The Archaeologist shall provide all of the professional services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project.

1.4.12 Technical Advisory Services

The services included herein are described on the basis that the ALDT will provide these services directly to the CA. However, the CA reserves the right to under any Call-Off Contract to novate the ALDT or any member of the ALDT to a construction contractor. In the event that any Call-off Contract proceeds on the basis of a design and build form of construction contract and the ALDT, or any part thereof, is not novated to the successful main contractor(s), the ALDT shall provide Technical Advisory services to the CA in order to, inter alia, ensure that the developed detailed design information as prepared by the construction contractor(s) shall continue to meet or exceed the CA's brief and technical requirements. The ALDT will be required to establish appropriate performance specifications and to provide all services necessary to review and certify (to the CA) the contractors' design on a timely basis. Where this requires a reduction in the scope of services being provided, a variation will be issued, and the price reduction shall be determined following negotiation and based on the applicable hourly rates. It should be noted Project Supervisor for the Design Process will not be novated to a construction contractor.

1.4.13 Due Diligence Services

The CA will be actively seeking investment opportunities in completed developments and therefore will require multi-disciplinary technical due diligence services on all aspects of completed developments to support CA and/or other funder commitments.

The requirement for due diligence services will be defined in the mini tender project brief.

- The ALDT may be required to work with the LDA and appointed, QS, Property/ Valuation, Legal and Other Advisors to complete comprehensive due diligence which will include, but is not limited to:
 - Commentary on asset and site characteristics (features inside site boundary) including overall scheme assessment, planning, unit typologies, number of 1/2/3 beds etc., development specification, unit standards and site amenities.
 - Assessment and commentary regarding viability to include:

- Value for money,
 - Net and gross internal area including evaluation of ratios,
 - Design and cost efficiency with particular reference to layouts, bed spaces, building aspect, parking (spaces & location), private amenity space, communal amenity space, ceiling heights, fit out / furniture and specifications.
 - Environmental considerations
 - Transport and accessibility
 - Services and utilities
 - Assessment of operational costs
 - Level of affordability (rental levels / affordability threshold / future sales levels)
 - Capital requirements
 - Delivery programme & timelines
 - Sensitivity / Risk analyses
 - Other viability requirements as required
- The ALDT may be required to prepare example internal layouts as part of the due diligence process.
 - Provide advice in relation to technical clauses and development specifications for inclusion in contracts.
 - Provide a comprehensive due diligence report.

1.4.14 Project Monitoring Services

The requirement for project monitoring services will be defined in the mini tender project brief. If required, the following scope of service will apply:

- Ensure the interests of the LDA are protected.
- Work as part of a technical monitoring team to ensure a successful outcome for the project and completion of the development in accordance with the:
 - development agreement / other legal agreement(s),
 - all relevant laws and regulations,
 - project programme and budget
 - quality requirements defined in the development agreement.
- Provide technical advice in relation to contractual clauses and development specifications for inclusion in contracts.
- Liaise and support the LDA project team (LDA DM, PM, legal, commercial, property etc) as required in the execution of legal agreements.
- Provide monthly technical reports on project progress.
- Prepare reports and documents as required by or on behalf of the CA.
- Challenge, review, comment and provide recommendations in relation to proposals put forward by the appointed delivery team in relation to design, changes / variations etc.
 - Evaluate any technical change orders / variations proposed and recommend for completion.
- Attend meetings with the appointed delivery team in addition to meeting with the CA monitoring team.
- Review the proposed designs and challenge these designs to ensure the most cost effective and efficient solution is developed.
- Complete regular site inspections to ensure progress is in compliance with the development agreement / any associated agreements.
- Ensure compliance with any technical obligations of the contract at handover / PC.

- Provide a recommendation for release of any retention / final payments in consultation with the QS.
- Support the operational team in appointing maintenance contractors on completion of the works.
- Operate from and comply with third party document management systems as required to facilitate communication with the delivery team. Upload project documentation on to the LDA documentation management system for record.

1.5 Drawing Deliverables

As a minimum all project drawings will be delivered in 2D using AutoCAD or similar software. Some projects may be required to be delivered using BIM, where the design team are required to design in 3D to facilitate this process this will be defined in the project mini tender. Information manager and BIM Coordination Services are noted as a specialist services in section 1.6.

As noted in section 1.4.1 all teams will be required to use BIM 360 as the common data environment for the project, this platform will be used for all projects regardless of the format of drawing information.

1.6 Specialist Services

Specialist Services to be provided by ALDT and included in mini tenders (as applicable)	Specialist Services to be procured and co-ordinated by the ALDT (including all necessary documentation such as Preliminary Safety, Health & Welfare Plan) and reimbursed by the Contracting Authority (as applicable / non-exhaustive list)
<ul style="list-style-type: none"> • Archaeology Services & Reporting • Building Conservation Report • Arborist Services • Acoustic Consultant Services • Asbestos Specialist Services • Building Surveys (measurement and condition) of existing buildings • Landscaping Visual Impacts Assessment & Graphics (incl. verified views and CGIS) • Wind Modelling & Report • Environmental Assessments and Monitoring (to incl. Mammal Expert, Ornithologist, Ecologist) • Air Quality & Climate Modelling & Monitoring • Background Noise Survey • Sunlight & Daylight Modelling - Impact Studies & Report • Construction & Demolition Waste Management Plan • Operational Waste Management Strategies • GPR Survey 	<ul style="list-style-type: none"> • Archaeology Testing • Test Trenching & Excavation Monitoring • Topographical Surveys • Biodiversity & Ecological Surveys (e.g. Bat & Bird Surveys, Mammals, Invasive Plant Survey) • Ground / Geotechnical Investigations • Utilities Survey • Soil Infiltration Tests • Noise, Dust & Vibration Modelling & Monitoring • Tree Survey & Report • CCTV Survey • Pressure Testing Watermains • Waste Acceptance Criteria Assessment • Traffic Counts • Contaminated Land & Remediation Specialist • Intrusive surveys • Protected Structure fabric sampling and analysis • Asbestos Survey • Planning Application Website

<ul style="list-style-type: none"> • Drainage Records • Water Supply Records • Flood Risk Assessment • Road Safety Audit • Photomontages • Creche report • Schools capacity report (if required) • Information Manager & BIM Coordination Services • Building Energy Modelling • Facade Specialist Services 	<ul style="list-style-type: none"> • Ecological monitoring services, including Ecological Clerk of Works. • Purchase of BIM 360 licences.
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The design team shall advise at the earliest possible stage of any other surveys that may be required for the project and shall scope and procure such surveys in consultation with the client. Such surveys could include the digging of slit trenches, camera surveys etc. It will be the responsibility of the team to source and coordinate these surveys.

1.7 Project Stages

The ALDT will be required to provide all required professional services for Stages (1a) and (1b) up to the issue of the Planning Application, and in the event of services required post lodgement of the planning application, Stages (2) through to (5) of the Conditions of Engagement, in summary:

Stage 1(a): Feasibility, Urban Design / Masterplan, and Outline Design Stage (*up to CA approval of the Feasibility Report*)

Stage 1(b): Preliminary Design and Planning Application Stage (*up to submission of the planning application(s) - additional planning services post lodgement of application will be negotiated (possibly a lump sum) based on tenderers' hourly rates*)

Stage (2): Detailed Design and submission of Statutory applications (*up to issue of the full tender package; to include input to the main contractor pre-qualification process and development of the tender documents*)

Stage (3): Tender Action, Evaluation and Award (*from issue of the full tender documents to contract award*)

Stage (4): Construction Stage (*up to Practical Completion of the final phase*)

Stage (5): Handover Period (*up to fully operational facilities including the completion of all snagging works*)

Further details in relation to the required Consultancy Scope of Services for Stages (1) through to (5) is provided in this document.

The Project Stages may be subject to overlap depending on the circumstances and main contractor procurement and contracting strategy of any Call-Off Contract.

General services are required by all ALDT members for all stages and these include:

- Such services as are reasonable and incidental to the specific services identified below in relation

to each element of the design stage.

- Such services as are reasonable and required to complete each element of the design such that the Project can be completed in accordance with the Project Brief.
- as a reasonable professional consultant would contemplate or infer as being required as part of each element of the services.
- Maintenance of the project risk register.
- Attendance and presentation at project meetings, including:
 - CA meetings
 - Stakeholder meetings
 - Local Authority / Pre-planning / Utility provider consultation meetings
 - ALDT design meetings and workshops
 - Risk workshops
 - Site meetings
 - End of stage project review meetings
 - Lessons learned sessions
- A formal design team report is required on completion of each stage for client approval.

2 Stage 1a – Feasibility, Urban Design / Masterplan & Outline Design Stage

2.1 Architectural Services and Architectural Services – Masterplan and Urban Designer

- Act as the DTL.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief including Sketch Proposals and Cost Analysis to achieve brief in advance of design
- Update and re-issue written project brief
- In consultation with the ALDT, assist the CA's appointed representative(s) to produce a Detailed Project Programme upon appointment setting out how the Project will be delivered within the required time period or by the required delivery date, and maintain this programme throughout the project lifecycle;
- Concept development.
- All liaison with the Masterplan and Urban Designer Architect and production of solutions for the best fit approach to sustainable development and vision while being sensitive to the surrounding environment.
- Assessment of risks in context of urban design and proactively lead on workshops with the ALDT as necessary to assess the mitigation measures to be implemented and progress the implementation of these mitigation measures.
- Advise the CA on any potential considerations with regard to third party engagement (i.e. boundaries, access, wayleaves, etc.) which may exist requiring legal attention.
- Investigate all possible grant schemes/funding support available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
- Make applications for the grant schemes/funding support where relevant on behalf of the CA and administer the applications as so necessary.
- Liaise with the CA / CA's Property Advisors / CA's appointed representative(s) as required to progress site feasibility studies and masterplans.
- In consultation with the CA's professional advisers and project stakeholders to develop the feasibility and possible capacity of the site for the proposed scheme undertake the following:
 - Present a project process plan for the feasibility stage for discussion and approval by the CA.
 - Collect and analyse baseline information.
 - Carry out urban design, landscape, and ecological analysis.
 - Develop a series of design and site layouts options.
 - Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
 - Feasibility testing and development of site capacities.
 - Review alternative design and construction approaches and cost implications.
 - Ensure alignment with CA Strategies.
 - Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
 - Lead, proactively engage and manage the ALDT to review new technologies, innovative design, and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to achieve best practice design and construction solutions where relevant

to the proposed project. Such engagement to include workshops and reporting if required to feed into sustainable and economic feasibility recommendations for the development.

- Input relevant observations and findings into later phasing/design evolutions.
- Master planning, feasibility studies, condition surveys and funding proposal documentation support.
- Condition and sustainability report preparation.
- Survey existing buildings / structures on site to ascertain condition, dimensions, levels etc. or any required information to progress the design (including external survey for landscape design), following which determine scope of works, advise CA on any implications of works and report for CA review/agreement;
- Implement surveys of existing facilities, measured building surveys and prepare all relevant drawings of the existing building and associated infrastructure.
- Review current Statutory Consents, Local Authority area development plans and Authority masterplans in place in relation to the development site(s) to ensure proposals comply and amend/advise as required.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into relevant documentation.
- Advise the CA and the ALDT of all duties and responsibilities arising from the existing, planned and anticipated statutory regulations.
- Consultation on the acquisition of Statutory Approvals including Planning submission, Fire Safety Certification, Disability Access Certification, commuting, landscape, infrastructure, and other development related matters.
- Implement as required meetings with ALDT to gather all information necessary to begin the design process.
- Review outline designs to ensure compliance with obligations and Building Regulations.
- Develop schedule of works necessary to advance the initial phase of the works if required when agreed with the CA in advance - example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main Contractors. The Architect is to carry out the role of Employers Representative for the works.
- If agreed with the CA, develop a scope of works including drawing and specifications for any specialist area of work required to be procured in advance of the main contract to de-risk the site in advance of main contractor tender pricing and to expedite the works beginning onsite in a prompt manner to allow the main Contractor(s) complete the works within the required timescale.
- Provide weekly short form progress reports to CA & the CA's appointed consultants (as relevant) and monthly reports (presented at monthly CA meeting attended by all ALDT members) during this phase.
- Agree the change procedure with the CA and manage / report on same.
- Coordinate CA interface on a continual basis.
- Compile Stage 1a report coordinated with input from all ALDT consultants and obtain CA Approval.

2.2 Mechanical & Electrical Services

- Liaise with DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.

- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL to contribute to a coordinated Detailed Project Programme as required.
- Liaise with DTL to review CA procedures and design standards to ensure adherence.
- Liaise with the DTL and ALDT Members to coordinate design elements.
- Carry-out utility availability desk-top studies.
- Survey and report on existing installation conditions and issue recommendations
- Investigate all possible grant schemes available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
- Make applications for the grant schemes on behalf of the CA and administer the applications as so necessary.
- Advise on technical guidelines, including NZEB compliance.
- Master-planning, feasibility studies, condition surveys and funding proposal documentation support.
- Condition and sustainability report preparation.
- Attend site visits to review existing facilities identified for refurbishment / adaptive re-use as agreed with the CA.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme including the following:
 - Assist with formulation of a project process plan for the feasibility stage and present to the CA for discussion and approval.
 - Collect and analyse baseline information.
 - Assist with urban design analysis and attend workshops, as necessary.
 - Assist with development of a series of design and site layouts options
 - Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
 - Feasibility testing and development of site capacities.
 - Review alternative design and construction approaches and cost implications
 - Ensure alignment with CA Strategies.
 - Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
 - Support the Architect, and other ALDT members, with feasibility strategies for the Project including attendance and participation in workshops, reporting and recommendations.
- Develop outline Electricity, Gas, Water, communication infrastructure in line with the CAs requirements
- Provide cost valuation support to ALDT and value engineering activities
- Advise on cost implications of various options and any alternative design as required.
- Develop a schedule and if necessary, a BOQ for works necessary to advance the initial phase of the works - example: strip out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- Advise on tendering procedures
- Develop a schedule for any specialist area of work required to be procured in advance of the main

contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.

- Input into Stage 1a report, as necessary.

2.3 Quantity Surveyor Services

- Liaise with the CA and appointed consultant team to determine the CA's initial requirements and input into the development of the project brief.
- Review and comment on the preliminary budget approval for the project with respect to the project brief.
- Undertake a site visit (to each site if more than 1no.) and review all existing information, including existing site surveys, draft masterplans, reports, health and safety risk assessment(s):
 - Identify any information gaps that may exist and advise on the commercial impact of same.
 - Advise on additional surveys that may be required and procure surveys on behalf of the CA. Prior approval for all additional work is to be provided by the CA.
- Prepare commercial reports and cost plans as required for presentation to LDA departments / other stakeholders.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.
- Advise on potential procurement options and feasibility of the various options.
- Provide a high-level overview of the commercial constraints within which the ADLT must work and prepare an initial budget estimate from feasibility studies.
- Participate in project meetings including design team meetings to ensure the design progresses in accordance with the budget.
- Participate in and provide cost advice for optioneering exercises.
- Liaise with the Mechanical and Electrical (M&E) Sub Consultant to ensure that cost estimates for M&E are included in cost reports.
- Prepare overall project cost calculation and cash flow projections.
- Prepare a commercial report for inclusion in the Stage 1a Design Report to be issued by the consultant team on completion of the stage. This is to include potential procurement options and associated risks and opportunities for client consideration.

2.4 Civil & Structural Engineering Services

- Liaise with the DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL, contribute to a coordinated Detailed Project Programme as required.
- Liaise with the DTL and ALDT Members to coordinate design elements.
- Carry-out site condition and ground contamination desk-top studies.
- Coordinate and Prepare as required Flood Risk Assessment, Engineering Services Report, Mobility Management Plan, Traffic & Transportation Assessment, Construction & Environmental Management Plan.
- Surveys – progress any required surveys required to progress design including survey & report on

- existing structure & infrastructure
- Attend site visits to review existing facilities identified for refurbishment / adaptive re-use as agreed with the CA.
 - Investigate all possible grant schemes available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
 - Make applications for the grant schemes on behalf of the CA and administer the applications as so necessary.
 - Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
 - Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme including the following:
 - Assist with formulation of a project process plan for the feasibility stage and present to the CA for discussion and approval.
 - Collect and analyse baseline information.
 - Assist with urban design analysis and attend workshops, as necessary.
 - Assist with development of a series of design and site layouts options
 - Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
 - Feasibility testing and development of site capacities.
 - Review alternative design and construction approaches and cost implications
 - Ensure alignment with CA Strategies.
 - Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
 - Support the Architect, and other ALDT members, with feasibility strategies for the Project including attendance and participation in workshops, reporting and recommendations
 - Liaise with DTL to review CA procedures and design standards to ensure adherence.
 - Develop outline structural infrastructure and building opening requirements
 - Audit existing infrastructure, potential strengthening, and replacement requirements
 - Master-planning, feasibility studies, condition surveys and funding proposal documentation support.
 - Condition and sustainability report preparation.
 - Generate options to meet outline requirements
 - Develop outline design drawings and issue to the ALDT in a timely manner
 - Prepare cost estimates for the structural services and issue to Quantity Surveyor & DTL.
 - Draft a strategy for structural infrastructure
 - Advice on compliance with Building Regulations / other statutory requirements
 - Report on existing installations
 - Develop schedule of works as necessary to advance the initial phase of the works - example: strip out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
 - Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
 - Input into Stage 1a report, as necessary.

2.5 Landscape Architectural Services

- Contribute to the development and preparation of Project Brief in consultation with the DTL.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL, contribute to a coordinated Detailed Project Programme as required.
- Contribute to the development of best practice design & construction solutions for successful delivery of affordable permanent occupancy residential units.
- Contribute to the examination and preparation of alternative design solutions, adjustments and design revisions as required to meet the Project brief and budget.
- Assist with urban design analysis and attend workshops, as necessary.
- Contribute to the preparation of a full and complete statement of the CA's functional, aesthetic, and operational requirements for the Project.
- Advise and assist the DTL / Quantity Surveyor in developing the Project Budget.
- Contribute to preliminary cost estimates and Outline Cost Plan for the project and assessment against the agreed budget.
- Carry out design review with reference to functionality, efficiency, sustainability, commercial liability, economy, whole life costs and suitability for financing, sale, or lease, as may be required.
- Site appraisal and report – Carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- Advise the DTL on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA's requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Contribute to the Scheme Design and general design Specification in accordance with the Project Brief.
- Comply with design production programmes set by the DTL.
- Contribute to pre-planning and any other necessary statutory or regulatory consultation as required.
- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
- Contribute to site investigation process, site surveys and tests, examination of availability of public utilities and associated reports.
- Input into Stage 1a report, as necessary.

2.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended, notwithstanding any inconsistent Contract contents.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and

seek & provide relevant information to inform the decision-making process.

- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Confirm compliance with PSDP duties in respect of this stage.
- Liaise with the DTL and members of the ALDT to ascertain a full understanding of design risk assessments and provide advice as required.
- Assist in preparation of Stage report for CA review.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Site visits as required during this stage.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Provide Health and Safety expertise and input at all stages of the Preliminary design phase of the project
- Compile design risk assessments as required.
- Input into Stage 1a report, as necessary.

2.7 Planning and Environmental Consultancy Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Advise on the appropriate planning strategy for the site taking account of the various elements of works proposed. Manage and coordinate the strategic planning advice and all associated planning documentation required during the feasibility stage of the project.
- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek to provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend workshops as necessary to input into the urban design analysis.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme immediately on appointment setting out how the Project will be delivered within the required time period or by the required delivery date specifically in relation to planning / environmental programme constraints.
- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.
- Advise the DTL on potential project risks.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports.

- Advise the DTL in relation to advance works requirements where applicable.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- Provide a comprehensive Town Planning Evaluation Report to the Design Team which sets out the basic planning principles and parameters within which the design will evolve, and the final design should be structured.
- Assist the DTL and participate with consultations to the CA’s professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Assist with development of a series of design and site layouts options.
- Appropriate Assessment Report.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Advise on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA’s requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Review and advise upon the planning history of the subject site, relevant adjacent sites, and the strategic and statutory planning context. Comment on the project brief and design proposals in the context of the planning constraints and opportunities.
- Assist in preparation of Stage 1a report for CA review

2.8 Traffic & Transport Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend workshops as necessary to assist with urban design analysis.
- Prepare and assist ALDT with formulation of Mobility Management Plans, Traffic & Transportation Assessments, Construction & Environmental Management Plans.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in their occupancy.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports.
- Carry-out (appoint and administer) required surveys and market research as is necessary.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme.

- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.
- Advise the DTL on potential project risks.
- Advise the DTL in relation to advance works requirements where applicable.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- Assist the DTL and participate with consultations to the CA’s professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Assist with development of a series of design and site layouts options
- Advise on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA’s requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Assist in preparation of Stage 1a report for CA review

2.9 Archaeology Consultancy Services

- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Conduct an archaeological desktop study to advise on the archaeological characteristics of the site and associated mitigation measures.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports.
- Advise the DTL in relation to advance works requirements where applicable.
- Carry-out (appoint and administer) required surveys and research as is necessary.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme
- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.

- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Assist in preparation of Stage 1a report for CA review

3 Stage 1b – Preliminary Design and Planning Application Stage

3.1 Architectural Services

- Act as DTL.
- Lead the ALDT consultants' input to updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Utilise appropriate sustainable and environmental design concepts as agreed with the CA.
- Prepare a sustainability report for the development.
- Prepare detailed masterplan for the site(s).
- Liaise with designers to review design progress and to advise to ensure compliance with regulations and obligations.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement.
- Confirm the results of surveys have been considered in the outline design and Planning Application.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design, and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents.
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into outline design drawings and Planning Application.
- Provide planning consultancy and advice throughout the design phase as required.
- In consultation with the ALDT, prepare and collate necessary reports required for Planning Applications.
- Provide information for the preparations of a project cost plan.
- Monitor and Report on Design plans & timelines for participation by ALDT members, CA, and other relevant parties.
- Provide all imagery (3D images and graphics) for Planning Application.
- Provide all necessary preliminary certifications at this point (e.g., Well)
- Provide fortnightly progress reports to CA during this phase
- Ensure the planning application is feasible from a fire safety and disability access design perspective, as necessary.
- Stage 1b progress report to CA prior to issue Planning Application with input from all ALDT consultants and obtain CA Approval:

3.2 Architectural Services – Masterplan and Urban Designer

- Liaise with DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Consult with the ALDT consultants to update / develop proposals throughout this stage to further address the scope of services identified at Stage 1a taking on board, where relevant, engagements with Stakeholders.
- Prepare a design master plan for the development, to include new housing, new open spaces and new community facilities; provide such drawings, 3-D models and views and reports as required to describe the plan; and participate in public display and presentations to the relevant stakeholders.

- Advise on the development and interaction with community facilities (including local retail and leisure etc.).
- Update recommendations, if required, for working with the proposed mix and distribution of tenures on the lands to create a sustainable model going forward.
- Assist and input into the preparation of Planning Application during this stage.
- Advise the CA / lead Architect on any potential considerations with regards third party engagement (i.e. boundaries, access, wayleaves, etc.).
- Carry out required modelling and analysis as necessary for Planning Application.
- Liaise with the project team to update risk assessments in context of masterplan and urban design and attend workshops with the ALDT as necessary to assess and implement mitigation measures.
- Input into the Stage 2b report.

3.3 Mechanical & Electrical Engineering Services

- Continue engagements with utilities providers where necessary to determine existing services to/from the site.
- Identify Electrical, Gas, Water, communications infrastructure, Supply availability, costs etc. and arrange any specialist surveys on services to be carried out – e.g. Vibration isolation, etc.
- Prepare and submit necessary enquiries and applications to utility providers. Advise DTL and CA of any implications. Liaise with Quantity Surveyor to ensure any abnormal costs are reflected in the cost plan.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Build in future flexibility as a critical design factor
- Life cycle cost assessments where appropriate such as heating, energy performance, sustainability, etc.
- Planning and negotiating with supply authorities in connection with the provision and installation of supplies, as necessary.
- Prepare business case studies for alternative options for energy distribution within the development, e.g., centralised versus decentralised systems.
- Prepare all coordinated outline design drawings and documentation for Planning Application
- Provide all required information to the Quantity Surveyor, as necessary.
- Prepare site plans and input into detailed coordinated masterplan for Planning Application.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement
- Confirm the results of surveys have been considered in the Outline design and Planning documents.
- Liaise with adjacent landowners, as necessary.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare BER(s) as required.
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Input as required into Stage 1b reports to the CA.

- Carry out required modelling and analysis as necessary for Planning Application
- Provide all necessary preliminary certifications at this point (e.g., BER)
- Assist the DTL in ensuring the planning application is feasible from a fire safety and disability access perspective, as necessary.
- Demonstrate compliance with Building Regulations / other statutory requirements.

3.4 Quantity Surveyor Services

- Carry out a cost review of the preliminary design. Make recommendations on alternative preliminary design and construction options in respect of costs, including but not limited to appropriateness of construction, economy of construction per building element/key materials and key items to be included in the output specifications.
 - Advise on cost of design team proposals, including effects of site usage, shape of buildings, alternative forms of design and construction as design develops.
 - Assess options for building services design with the M&E sub consultant and advise on costs and life-cycle costing as appropriate.
 - Participate in and provide cost advice for optioneering exercises.
- Prepare an Outline Cost Plan to include all project costs (e.g. Capex cost, FM Services cost and Lifecycle cost if applicable) and prepare associated cash flow forecasts for issue to the Client. This shall present costs at a high level on a site by site basis and aggregate basis (format to be agreed with the Client) and shall show the appropriate VAT rate
- Attend Preliminary Design meeting(s) with the Client to review the preliminary design, planning application and project costings.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.
- Prepare a commercial report for inclusion in the Stage 1b Design Report to be issued by the consultant team on completion of the stage including the recommended procurement strategy.

3.5 Civil & Structural Engineering Services

- Consider relevant reports, data, and information available and arrange surveys of the site as required including a survey of the existing foul and surface water drainage system (at the CA cost).
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Liaise with the CA representative and make sure those relevant and appropriate factors from the end-user's specialist functions are incorporated into the designs
- Build in future flexibility as a critical design factor
- Assess existing structure and site surveys and complete additional surveys as required e.g. vibration, isolation etc.
- Generate relevant data and reports for the ALDT, and review this data against scheme design and report any anomalies to the DTL / CA.
- Prepare detailed masterplan for the site.
- Liaise with adjacent landowners, as necessary.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Advice on compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the outline design and Planning Application.

- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare Construction Management Plan as required by planning application
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Input as required into Stage 1b reports to the CA

3.6 Landscape Architectural Services

- Prepare detailed masterplan for the site.
- Prepare outline sketch design incorporating landscaping layout, accompanied by sections and elevations indicating the general character and massing of the planting. A number of options may need for approval prior to Planning Application.
- Provide all necessary Landscaping Services cost advice to the DTL / Quantity Surveyor.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Revise as necessary the Landscaping documentation as required to meet the Project Brief and Budget following consultation with the ALDT / CA in advance of Planning Application.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the outline design and planning application.
- Support the Architect, and other ALDT members as necessary in the utilisation of best practice construction methods & construction solutions where relevant, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents;
- Prepare Planning Permission application submission documentation and drawings.
- Assist in the planning application, ensure compliance with the planning context to include all associated technical reports as required.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Comply with design production programmes by the ALDT to meet the agreed Programme.
- Attend to consultation and liaison with adjoining owners or interests, as required.
- Input as required into Stage 1b reports to the CA

3.7 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended, notwithstanding any inconsistent Contract contents.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate

factors are incorporated into the Project brief.

- Provide Health and Safety expertise and input at all stages of the design phase of the project
- Compile all necessary design risk assessments.
- Input as required into Stage 1b reports to the CA

3.8 Planning and Environmental Consultancy Services

- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders as required.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Contribute to a project specific sustainability and energy use strategy and satisfies the CAs requirements in a cost-effective manner.
- Collaborate with the ALDT in formulating recommended design solutions for CA approval and subsequent development.
- Contribute to site investigation process, site surveys and tests, examination of availability of public utilities and associated reports.
- Prepare preliminary Environmental Consultancy Services drawings and report. A number of options may need to be examined to satisfy the CA needs, Cost Limits and Planning requirements.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
 - Prepare any documents needed for the planning application which are not specifically identified as being prepared by others including but not limited to any planning policy statement or statement of community involvement if required for the application.
- Appropriate Assessment Screening and if required Natura Impact Statement.
- Ecological Impact Assessment.
- Environmental Impact Assessment Screening for the site, in co-operation with the other ALDT members, a full Environmental Impact Assessment Report (to include all associated surveys and reports).
- Prepare design for Environmental elements.
- Revise as necessary the Environmental Services documentation following a review with the DTL and the CA and submit revisions for approval.
- Coordinate the planning application, ensure compliance with the planning context to include all associated technical reports as required.
- Review drawings and planning application information pre-lodgement to ensure the package is appropriate for the application, from a planning perspective.
- Co-ordinate and lodge planning application including preparation of statutory notices, application form, application fee calculation and planning report.
- Issue a Schedule of Documents for the planning application detailing the specific documents required for the application and associated responsible party.
- Assist DTL in the preparation of a detailed coordinated design programme for this stage.
- Assist in preparation of Stage 1b reports for CA review.
 - Lessons learned sessions
- Ensure all documents formally submitted to Local Authorities are saved to project document management system.

3.9 Traffic & Transport Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in occupancy.
- Prepare preliminary Traffic & Transport Services drawings and report. A number of options may need to be examined to satisfy the CA needs, Cost Limits and Planning requirements (including further Fire Safety and Disability Access requirements).
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Prepare road safety audits as required for the planning application.
- Input into Construction Management Plan as required by planning application
- Provision information to the DTL / Quantity Surveyor, as necessary.
- Assist in preparation of Stage 1b reports for CA review

3.10 Archaeology Consultancy Services

- Contribute to pre-planning, fire safety and any other necessary statutory or regulatory consultations as required.
- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
- Prepare preliminary Archaeology Consultancy Services drawings and report for Planning Application.
- Prepare developed sketch / outline design for Archaeological elements.
- Provide information to the Quantity Surveyor and other Consultants to enable quantification for preparation of cost estimates and Cost Plan.
- Liaise with statutory bodies, as necessary.
- Contribute to the planning application, as necessary.
- Assist in preparation of Stage 1b reports for CA review

4 Stage 2 – Detailed Design and Statutory Approvals

4.1 Architectural Services

- Act as DTL.
- Coordinate the compliance responses to planning conditions once received. Prioritise the “prior to commencement” planning conditions.
- Directly prepare the response to individual planning conditions.
- After reviewing the existing CA data and consulting fully with the CA, complete detailed interior design & finalized space planning layouts.
- Develop detailed design drawings and specifications for tender.
- Utilise appropriate sustainable and environmental design concepts as agreed with the CA.
- Liaise with designers to review design progress and to advise to ensure compliance with regulations and obligations.
- Develop design programme; consider construction and procurement phasing; input into the contracting and procurement strategy.
- Prepare detailed cash flow for the period up to start of construction to include all ALDT fees and associated survey costs.
- Liaise as necessary with adjacent landowners, development partners to obtain all approvals
- Advise on, procure, and administer all necessary site surveys to support the detailed design.
- Oversee the application for all statutory licenses including archaeological, ecological, contamination, asbestos and oversee the associated mitigations.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement.
- Detail and specify fully all elements, including compliance with the requirements of the Building Control (Amendment) Regulations 2014 and the Code of Practice for Inspection and Certifying Building and Works.
- Confirm the results of surveys have been considered in the detailed design.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design, and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents.
- Advise the CA and ALDT of all obligations relating best practice design & construction solutions for successful delivery of affordable permanent occupancy residential units during this stage.
- Prepare and lodge Fire Safety Certification application, Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into detailed design, Statuary Approvals Applications, and tender documentation.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into outline design drawings and Planning Application.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, prepare, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare Additional / Further Information responses, Planning Compliance submission(s) and submit to authorities if required.

- Provide planning consultancy and advice throughout the design phase as required.
- Advise the CA and ALDT of all duties and responsibilities arising from existing planned and anticipated statutory regulations.
- Provide Daylight and Sunlight Analysis.
- Provide information for the preparations of a project cost plan.
- Develop schedule of works necessary, if required, to advance the initial phase of the works- example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- If agreed in advance with the CA, Develop a scope of works including drawing and specifications for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor complete the works within the required timescale.
- Coordinate the work of all ALDT members in drawing up production information for tender documentation to provide a fully documented proposal for the tender evaluation phase.
- Arrange sample finishes presentation for CA sign off
- Prepare and agree with the CA a procurement strategy for the projects – 2 stage restricted procedures (OJEU) to be assumed.
- Produce comprehensive Works Requirements documents including performance specifications with input from the ALDT members.
- Coordinate a structured set of tender documents with all coordinated detailed design drawings and specifications for the works from the ALDT.
- Prepare Preliminary Inspection Plan (PIP) in consultation with the ALDT members in compliance with the Building Control (Amendment) Regulations 2014 and the Code of Practice for Inspection and Certifying Building and Works.
- Oversee the formulation of all tender documents, including Suitability Assessment Questionnaires (SAQ), Requests / Invitations to Tenderers, evaluation criteria, Forms of Tender and associated information documents with input from the ALDT and CA as required, and ensure fully documented proposal for shortlisting (SAQ), tendering and subsequent tender evaluation;
- Input as necessary into main contractor pre-qualification process.
- Advise, procure, and oversee any required enabling works.
- Provide imagery for project promotional material – provision of 3D images and graphics.
- Provide appropriate detail drawings; 1:10; 1:25; 1:50 for proper detailing and analysis
- Provide all necessary detailed certifications at this point (e.g., Well)
- Provide fortnightly progress reports to CA during this phase
- Prepare Stage 2 Report including pre-tender cost plan – present to CA towards the end of stage

4.2 Quantity Surveyor Services

- Prepare a Detailed Cost Plan (format to be agreed with the Client) with reference to the Preliminary Design and all project costs applying a top-down and bottom-up estimating approach. The Detailed Cost Plan is to include the following:
 - Capex costs including, main works (including M&E and ICT), fittings and equipment, external works, off-site works, abnormals, works in connection with Statutory Consents and risk costs
 - Opex costs including operating, maintenance (soft and hard)
 - Lifecycle costs

- Enabling/advance works costs (if any)
- Inflation indices and VAT figure(s)
- Unit rates used are to be substantiated with reference to relevant building rates, benchmark costs/projects, market rates/prices and any other key items and shall be measured, priced, and itemised on an elemental basis. Cost for items, such as furniture, fittings, and equipment (FF&E) (prepared with reference to a detailed matrix) and FM Services shall be itemised and demonstrated with reference to market rates.
- Insurance reinstatement costs
- Cashflow forecasts in respect of the key cost headings and an assumptions report.
- A detailed cost model for each cost heading including:
 - Lifecycle costs (with reference to building element, frequency of replacement, costs etc.)
 - Facilities management costs with reference to service delivery model, staffing costs, contracted services costs etc.)
 - FF&E (itemised with reference to market prices) [potentially where LDA retains ownership in a “Cost Rental” model].
- Maintain and update cost plans to reflect any design changes during the detailed design process. Prepare periodic reports and updated cash flow forecasts as required.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.
- Preparing such final calculations and details relating to the Works as may be required for submission for an independent check by others nominated by the CA.
- Prepare a pretender estimate for CA review prior to tender and advise on future anticipated inflation.
- Finalise the procurement strategy in consultation the PM and key design team members and seek approval of same from the LDA.
- Draft standard tender documents required under public procurement legislation such as Invitation to Tender, Prior Information Notices and liaise with the LDA to finalise and approve.
- Review detailed design and comment on commercial impact of final tender documents / drawings.
- Prepare Pricing Document in appropriate A.R.M. format and any additional procurement documents ready for tender action. This will include all relevant Procurement Documents required for tendering in accordance with Public Procurement Guidelines and all relevant legislation.
 - The Mechanical and Electrical Sub Consultant will provide a pre-tender estimate and detailed measured M&E schedules, in order to ensure that building service installations are incorporated into the detailed Bills of Quantities (BOQ) in accordance with ARM4, Supplement 2 or similar.

4.3 Mechanical & Electrical Engineering Services

- Identify Electrical, Gas, Water, communications infrastructure, Supply availability, costs etc. and arrange any specialist surveys on services to be carried out – e.g. Vibration isolation, etc.
- Apply for all utility connections and maintain a utilities tracker with reports issued to the DTL / CA as required.
- Liaise with the CA representative and make sure that relevant and appropriate requirements for the end user specialist functions are incorporated into the design.
- Build in future flexibility as a critical design factor

- Prepare pre-tender estimate for the building services and issue to quantity surveyor.
- Life cycle cost assessments where appropriate such as heating, energy performance, sustainability, etc.
- Planning and negotiating with supply authorities in connection with the provision and installation of supplies, as necessary.
- Prepare all coordinated detail design drawings and documentation for tender packs
- Prepare all coordinated design / tender drawings and specifications for the works in accordance with the relevant contracts.
- Produce comprehensive Works Requirements documents, all coordinated detailed design drawings and specifications for the works including performance specifications.
- Input to the completion of all tender documents, including Suitability Assessment Questionnaires, Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.
- Input into main contractor pre-qualification process.
- Complete detailed design of all mechanical building services
- Prepare and Complete the detailed design of all Electrical & information communication & technology building services
- Prepare detailed Mechanical & Electrical / Building Services design documents, drawings, and Specifications.
- Provide all required information to the Quantity Surveyor, including detailed measured M&E schedules, in order to ensure that building service installations are incorporated into the detailed Bills of Quantities (BOQ) in accordance with ARM4, Supplement 2 or similar.
- Consider and determine the interface required between building services and the specialist equipment
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement
- Confirm the results of surveys have been considered in the detailed design.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare BER(s) as required.
- Ensure all building layout designs are fully coordinated with M&E design
- Ensure all external areas undergo an underground spatial coordination analysis for pipe and ducting runs including chambers and also surface chamber cover layout design is coordinated within the public realm
- In conjunction with other ALDT Members, prepare Fire Safety Certification application and Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Optimise and provide all anticipated energy consumption data to the DTL and CA.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare Additional / Further Information responses, planning compliance submissions and submit

to authorities if required

- Carry out all modelling, preparation, testing, imaging as necessary to meeting design brief and/or operational requirements of building
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Develop a schedule and if necessary, a BOQ for works necessary to advance the initial phase of the works - example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Provide all necessary detailed certifications at this point (e.g., BER)
- Input as required into Stage 2 reports to the CA.

4.4 Civil & Structural Engineering Services

- Consider relevant reports, data, and information available and arrange surveys of the site as required including a survey of the existing foul and surface water drainage system (at the CA cost).
- Liaise with the CA representative and make sure those relevant and appropriate factors from the end-user's specialist functions are incorporated into the designs
- Build in future flexibility as a critical design factor
- Generate relevant data and reports for the ALDT, and review this data against scheme design and report any anomalies to the DTL / CA.
- Develop detailed design production documents, drawings, and specification from approved outlined proposals in a timely manner to allow the preparation of the tender documents, Bill of Quantities, and pretender cost estimate.
- Prepare detailed design and design calculations for the site.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Advice on compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the detailed design.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare Fire Safety Certification application, Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, prepare, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare all coordinated design / tender drawings and specifications for the works in accordance with the relevant contracts.
- Produce comprehensive Works Requirements documents, all coordinated detailed design drawings and specifications for the works including performance specifications.
- Input to the completion of all tender documents, including Suitability Assessment Questionnaires,

Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.

- Input into the main contractor pre-qualification process.
- Develop schedule of works necessary, if required, to advance the initial phase of the works.
Example: A isolation of existing utilities to facilitate the speedy commencement of works by the main contractor.
- Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Ensure all external areas undergo an underground spatial coordination analysis for pipe and ducting runs including chambers and also surface chamber cover layout design is coordinated within the public realm
- Input as required into Stage 2 reports to the CA.

4.5 Landscape Architectural Services

- Prepare detailed masterplan for the site.
- Prepare outline sketch design incorporating landscaping layout to a scale of not less than 1:200 illustrating how it is proposed to provide the areas set out in the Project brief. The plans shall be accompanied by sections and elevations indicating the general character and massing of the planting. A number of options may need to be examined to satisfy the CA requirements, cost limits and planning, fire safety, disability access and health and safety requirements. The design must be reconciled with the brief requirements. Submit outline sketch design to CA.
- Participate with the ALDT and other consultants in value engineering and life cycle costing exercises.
- In consultation with the Quantity Surveyor provide all necessary Landscaping Services cost advice, investigation, and support to the ALDT including examination of alternative designs, adjustments, and revisions to meet the Project Brief and Budget. Prepare costings for landscaping design options or alternative designs as required.
- Arrange for a detailed review with the DTL of the Landscape drawings and specifications, and formally confirm that they have been prepared in accordance with the Project Brief and that they are consistent with architectural drawings.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the detailed design.
- Support the Architect, and other ALDT members as necessary in the utilisation of best practice construction methods & construction solutions where relevant, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents;
- Prepare required drawings and documents for input with Fire Safety Certification & Disability Accessibility Certificate applications
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Respond where required to Additional / Further Information requests, planning appeal process if

applicable, and assessment and compliance with planning conditions (if required).

- Comply with design production programmes by the ALDT to meet the agreed Programme.
- Carry out whole life cost assessments as required in consultation with the Quantity Surveyor.
- Prepare detailed specification documentation for the works, including samples, testing, prototype, and QA procedures, with particular regard to sustainability, quality and standards required.
- Assist the DTL in the preparation of a report on the Detailed Design addressing all aspects of the developed design in an integrated manner in relation to the Project Brief, key stakeholder requirements, accommodation, and budget. Assist in a full design briefing to the CA.
- Conduct design review with reference to functionality, efficiency, sustainability, commercial viability, economy, whole life costs as may be required.
- Produce comprehensive works requirements documents, all coordinated detailed design drawings and specifications for the works.
- Input to the completion of all tender documents, including Suitability Assessment Questionnaires, Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.
- Prepare and complete Works' Contract production information including detailed Specialists' design for tender documentation, tender drawings, specifications, and Forms of Tender to provide a fully documented proposal for tendering and subsequent tender evaluation.
- Input as required into Stage 2 reports to the CA

4.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Provide Health and Safety expertise and input at all stages of the design phase of the project
- Compile design risk assessments from the relevant ALDT members.
- Issue a preliminary H&S plan to form part of the tender documentation.
- Assist in preparation of Stage 2 report for CA review.

4.7 Planning and Environmental Consultancy Services

- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders as required.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Prepare design for Environmental elements.
- Revise as necessary the Environmental Services documentation following a review with the DTL and the CA and submit revisions for approval.
- Review on an on-going basis the design to ensure that it is compatible with the requirements of the Planning Authority.
- Prepare Planning Compliance submission(s) and submit to authorities.
 - Provide the Client with a report on the conditions attached to any consent if required

- Agree with the Client and other Consultants a programme for the submission of information to discharge the conditions.
- Agree the discharge of conditions with the Local Authority.
- Advise on, prepare, and respond where required to Additional / Further Information requests, planning appeal process if required. Preparation of First party Appeal against (i) conditions or (ii) Refusal of Permission (if relevant) or First Party Response to Third Party Appeals (if relevant).
- Co-ordination of a unified response on all relevant planning conditions in the event of grant of planning permission issuing from the local authority which requires compliance and further negotiations with the local authority.
- Carry out whole life cost assessments as required in consultation with the Quantity Surveyor.
- Contribute to the risk management strategy and risk register.
- Assist DTL in the preparation of a detailed coordinated design programme for this stage.
- Advise on the need for any Specialists and associated cost factors.
- Coordinate the provision of necessary information to the DTL / Quantity Surveyor for the developed cost plan report.
- Advise upon, procure, and oversee all necessary surveys, on site measures & mitigations including statutory license applications. Provide timely advice on timelines to the DTL and CA.
- Produce comprehensive input to the works requirements documents, including all associated detailed design drawings and specifications for the works.
- Assist in preparation of Stage 2 reports for CA review

4.8 Traffic & Transport Services

- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in occupancy.
- Advise on the need for any Specialists and associated cost factors.
- Advise on the need for any Specialist contractors and associated cost factors, carry out and/ or coordinate detailed design for Specialist works.
- Coordinate the provision of necessary information to the DTL / Quantity Surveyor for the developed cost plan report.
- Produce comprehensive input to the works requirements documents, including all associated detailed design drawings and specifications for the works.
- Contribute to cost plan and pre-tender cost estimate for the project and assessment against the agreed budget with DTL & the Quantity Surveyor.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Assist in preparation of Stage 2 reports for CA review

4.9 Archaeology Consultancy Services

- Contribute to the Scheme Design and general design Specification in accordance with the Project Brief.
- Carry-out on-site mitigation and monitoring, if required, as required, and formulate report upon completion, Includes all statutory license applications
- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
- Revise as necessary the Archaeological documentation following a review with the DTL and the CA

and submit revisions for approval.

- Carry out examination and preparation of alternative design solutions, adjustments and design revisions as required to meet the Project Brief and Budget.
- Provide information to the Quantity Surveyor and other Consultants to enable quantification for preparation of cost estimates and Cost Plan.
- Assist the ALDT in the assessment and compliance with the conditions of final grant of planning permission, to include all associated technical reports as required.
- Assist the ALDT with responding, if required, to Additional / Further Information requests, planning appeal process if applicable.
- Assist in the preparation of a procurement strategy for the project with the DTL.
- Input to works requirements documents, all coordinated detailed design drawings and specifications for the works.
- Assist in preparation of Stage 2 reports for CA review

4.10 Assigned Certifier

- Prepare a preliminary inspection plan for issue with the tender documents.
- Prepare a Compliance Appraisal Record spread sheet that will identify the Certifier/Inspection Interface between Designers and the various parts of the Building Regulations as scheduled in the Code of Practice. This document should clearly identify the roles and responsibilities for certification, ancillary certification and submission at commencement notice stage

4.11 Design and Ancillary Certifier(s)

- Engage with the Assigned Certifier to develop the Compliance Appraisal Record.
- Prepare a risk assessment of specific elements to be identified in the Preliminary Inspection Plan and a compliance document for inclusion with the Tender Documents demonstrating that all aspects of the Building Regulations to which an Ancillary Certificate relates have been considered. The appraisal will serve as a preliminary assessment of compliance with the Building Regulations and will be coordinated with other Ancillary Certifier members of the Design Team by the Design Certifier

5 Stage 3 – Tender Action, Evaluation, Award

5.1 Architectural Services

- Act as DTL.
- Carry out all necessary actions leading to award of contracts.
- Prepare tender documents for main works and specialist works where appropriate
- Assess and advise on any requirements for site monitoring.
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Prepare Stage 3 report.

5.2 Mechanical & Electrical Engineering Services

- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Prepare tender documents for specialist(s) where appropriate.
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.3 Quantity Surveying Services

- Liaise with the LDA, PM and key members of the ALDT to define the technical evaluation criteria and award of marks.
- In conjunction with the LDA's advisers:
 - Advise on the use and/or amendment of the standard forms of building contract and contribute to drafting of particular client requirements
 - Confirm general insurance responsibilities for the Project and comment on the commercial impact,
 - Advise on bonds for performance and other purposes,

- Advise on the need for collateral warranties.
- Attend Tender Documents Review meeting with the Client to finalise the draft tender documents.
 - Finalise draft tender documents, incorporating any amendments identified at the Tender Documents Review meeting.
 - Review final draft tender documents prior to ITT issue.
 - Take instruction from the Employer prior to going to tender.
 - Provide documents in hard copy for the CA, if required.
- Tender:
 - Review and prepare draft responses to all PQQ queries received from potential candidates. Liaise with project team members, the LDA and key stakeholders to seek input where required.
 - Assist and provide input to any clarifications to be raised with potential candidates.
 - Review and comment on the pre-qualification submission and advise on shortlisting prospective tenderers as required.
 - Support the LDA project team, including procurement team in issuing the tender to the market.
 - Attend interviews with selected tenderers.
 - Check tender submissions for accuracy, level of pricing, pricing policy etc.
 - Advise on errors and qualifications in the tenders and, if necessary, negotiate thereon.
 - Prepare a draft Tender Cost Report (format to be agreed with the Client) that includes:
 - detailed analysis, with accompanying commentary and opinion, of the costs submitted by tenderers.
 - details in respect of each cost headings including: Capex, FM Costs, and Lifecycle Costs (where applicable).
 - Professional report – executive summary, background, exclusions etc.
 - Review financial budget in view of tenders received and prepare revised cash flow.
 - Allow for Client review and incorporating Client feedback in respect of the Tender Technical Cost Report.
 - Chair a Tender Review meeting with the Client to review the draft Tender Cost Report.
 - Finalise Tender Cost Report, incorporating any amendments identified at the Tender Cost meeting and issue to Client.
- Attend pre-contract meetings with preferred tenderers to review any items the Contractor may be required to provide prior to contract signing. Review proposed programme for the Works and negotiate on behalf of the CA as required.
- Advise on any matters relevant to recommendation and appointment of the Contractor.
- Prepare any additional information necessary for the information of the Contractor to enable them to carry out the Works. This may include updates on Pricing Documents due to queries during tender process.
- Take instruction from the Employer regarding the award of the tenders.
- Draft letters for issue to unsuccessful tenders if required.
- Provide the Architect/ER/ Employer with the required documentation for contract signing, when requested.
- Coordinate and advise on any matters relevant to recommendation and appointment of the Contractor, including identification of possible cost savings required to maintain the Employer's budget.

- Preparing any additional information necessary for the information of the Contractors to enable him to carry out the Works. This may include updates on Pricing Documents due to queries during tender process.

5.4 Civil & Structural Engineering Services

- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Prepare tender documents for specialist(s) where appropriate.
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.5 Landscape Architectural Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013.
- Confirm compliance with PSDP duties in respect of this stage,
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Input to evaluation of contractors in relation to Health & Safety and site-specific design risks, risk assessments, construction methods statements, programme, etc.
- Evaluate the submissions received from contractors with respect to PSCS capacity & capabilities
- Review successful contractor's H&S plan to form part of the contract documentation
- Ensure appointment made in respect of Project Supervisor for the Construction Stage (PSCS)
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.7 Planning and Environmental Consultancy Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.8 Traffic & Transport Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.9 Archaeology Consultancy Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

6 Stage 4 – Construction

6.1 Architectural Services

- Act as DTL.
- Act as Employer’s Representative.
- As Employer’s Representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Take instructions from CA and obtain CA approvals on all occasions.
- Administer contract in a timely manner mitigating risk of future contractor claims
- Attend site to keep all relevant facts and documents in administrating claims and realistic account of actual progress and resources against contract and tender programmes
- Ensure contractor and site progress is achieved, design co-operation to avoid disputes (e.g. processing valid alternate proposals for submittals/works execution etc.)
- Support project construction and provide detailed drawings or clarification as required
- Review all contract & specialist design to ensure appropriate detailing is in place prior to construction. Attend all meetings and factory visits to ensure same.
- Update finishes board and obtain CA approval.
- Examine shop fabrication drawings prepared by the Contractor’s Sub-contractor, Specialists, or suppliers for the works.
- During the construction phase the Architect must review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Design details to achieve the performance outlined in the tender requirements – Request/Approve/Reject samples/submittals/mock-ups in a timely manner.
- Advise in relation to application of Liquidated Damages
- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the main contractor(s) and the rest of the ALDT
- Attend and issue notes on site walks and visits (minimum weekly)
- Chair monthly CA meeting with the rest of the ALDT
- Assist in the provision of monthly progress report to CA during this phase
- Issue a Draft building commissioning report prior to handover
- Issue Quality Check Sheets and Observe and report progress addressing same
- Liaise with site monitoring staff to ensure all works are being carried out to drawing and specification
- Request and examine collateral warranties for relevant specialist works
- Provide all necessary copies of drawings and specifications for the contract documents
- Perform the duties of Design Certifier under the Building Control (Amendment) Regulations 2014 and sign the Design Certificate in accordance with those Regulations. This will include but is not limited to:
 - Provide all necessary plans, specifications and documentation required for lodgement at commencement stage in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.
 - Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or

test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.

- Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Assigned Certifier's Implementation Plan.
- At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
- Provide the Design Certifier Certificates.
- Clearly define areas of responsibility for certification of compliance of the design.
- In conjunction with the Assigned Certifier review the Builder's project programme for coordination with the Preliminary Inspection Plan.
- During the construction stage clearly define the inspection methodology and undertake individual inspections in accordance with the agreed inspection plan. Provide inspection reports in a format agreed with the Assigned Certifier.
- Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role. As lead designer ensure information is provided by other disciplines as required.
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014.
- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government's "Code of Practice for Inspection and Certifying Buildings and Works" (February 2014).
- Attend meetings as required with the Assigned Certifier.
- Assess and advise on any requirements for site monitoring.
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Coordinate and chair all site meeting with the contractor and specialists on site progress
- Manage the construction phase of the project and issue all necessary instruction to the contractor
- Receive and respond to Contractors and/or Specialist's Requests for Information (RFI) providing additional design input and/or clarification where required.
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- Report to CA as required.
- Accept/Reject necessary for achievement of Substantial Completion, report to CA on same.
- Provide certification that the works have reached substantial completion.
- Provide Final Account reports to CA in accordance with the works contract.
- Advise CA in relation to achieving occupation of all or part of the building or early handover prior to issuing Substantial Completion.

- Complete final as built accessibility and fire safety audits and confirm compliance to original plan and regulations.
- Ensure accurate and complete as-built information including all operating manuals is provided to the CA on a timely basis.
- Agree snag list and timing with contractor, other ALDT members and CA.
- Provide monthly progress reports to the CA.
- Prepare Stage 4 Building Commissioning report for each phase that reaches Practical Completion.

Note the person identified as the Employers Representative (ER) will be required to attend all site meeting and site walks. Note all instructions are to be issued in writing through the ER.

6.2 Mechanical & Electrical Engineering Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the contractor(s) and rest of the ALDT
- Attend monthly CA meeting with the rest of the ALDT
- If required, carry out all necessary supervision of the works for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Review contractor and sub-contractor submittals as required to determine approvals or rejection of same.
- Give all necessary advice in a timely manner to the Employers Representative pertaining to services works being carried out to allow the orderly running of the contract
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014. This will include but is not limited to:
 - Provide all necessary plans, specifications and documentation required for submission in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.
 - Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
 - Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.
 - Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Design Certifier and Assigned Certifier's Implementation Plan.
 - At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
 - Provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier.

- Clearly define their area of responsibility for certification of compliance of the design.
- As completion or phased completion approaches on the building, the Ancillary Certifier will witness such tests as required under their remit for demonstrating compliance with the relevant parts of the Building Regulations. The Ancillary Certifier will provide updated documentation if the building as completed is at variance with the documentation submitted at Commencement Notice Stage.
- Provide Ancillary Certificate(s) for design changes after Commencement.
- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government’s “Code of Practice for Inspection and Certifying Buildings and Works” (February 2014).
- Attend all site meetings, site walks and visits
- Assist in the preparation of a Draft Building commissioning Report prior to Hand-over.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Input to Contractors and/or Specialist’s Requests for Information (RFI) responses providing additional design input and/or clarification where required
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer’s Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect’s remedial works upon notification of their completion by the Contractor.
- On request from the Employer’s Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Report to Employers Representative as required

The person identified as the lead/senior project Mechanical and Electrical Consultant will be required to attend all site meetings and walks. The Mechanical and Electrical Consultant may not issue instructions to the contractor. All Instructions must be issued in writing by the Employers Representative.

6.3 Quantity Surveying Services

- Provide cost advice to the Client on an as requested basis in relation to contract variations.
- Complete value engineering assessments / cost comparisons of various elements as required, e.g. external wall options, first floor joist construction, internal partitions versus blockwork walls etc. frame, elevation etc.
- Attend regular meetings with the Contractor and the design team to review progress and cost control and quality of works.
- Provide Inspection Services on a regular basis for Interim Payments, Cost Reports, and monitoring.

- Check materials stored off site as required.
- Prepare recommendations for interim payments to contractors, sub-contractors, and suppliers in accordance with building contract requirements.
- Attend regular meetings with the client with regard to progress and costs and prepare interim reports on same as required.
 - Prepare monthly Cost Reports including updated Cash Flow Expenditure
 - Attend cost review meetings with the CA. Issue minutes of these meetings when chaired by the QS.
- Attend, for the duration of the construction of the Works, the relevant site meetings in order to monitor that the Works are being executed generally in accordance with the contract and instructions given to the Contractor.
 - Attend such additional site visits as are necessary to ensure that certain stages of the works are completed in compliance Contractors claims.
- Attend sufficient regular meetings as required with the Contractor and the design team to review progress and properly administer and deliver a quality project within the required time and within budget.
- Monitor, measure, negotiate and report on all Post Contract variations and/or Client instructed scheme amendments.
 - Manage of all contractor claims, variations, and extras up to the time they are referred to dispute procedures under the contract by either party.
 - Assist the Architect/ER in assessing (preparing reports as required) Change Orders, Extension of Time Request etc as they arise.
- Prepare valuations for partial hand-over if required.
- Assist in adjudicating on any dispute or difference relating to the works which may arise between the Employer and the Contactor. The scope of this engagement shall not extend to advising the Employer following the taking of any step in or towards any arbitration or litigation in connection with the Works.

6.4 Civil & Structural Engineering Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the contractor(s) and rest of the ALDT
- Attend monthly CA meeting with the rest of the ALDT
- If required, carry out all necessary supervision of the works for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Examine and report on any variations and claims, including those resulting from delay / disruption, pertaining to Civil and Structural works being carried out to allow the orderly running of the contract
- Review contractor and sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Assist in the preparation of a Draft Building commissioning Report prior to Hand-over.
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014.

This will include but is not limited to:

- Provide all necessary plans, specifications and documentation required for submission in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.
- Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
- Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.
- Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Design Certifier and Assigned Certifier's Implementation Plan.
- At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
- Provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier.
- Clearly define their area of responsibility for certification of compliance of the design.
- As completion or phased completion approaches on the building, the Ancillary Certifier will witness such tests as required under their remit for demonstrating compliance with the relevant parts of the Building Regulations. The Ancillary Certifier will provide updated documentation if the building as completed is at variance with the documentation submitted at Commencement Notice Stage.
- Provide Ancillary Certificate(s) for design changes after Commencement.
- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government's "Code of Practice for Inspection and Certifying Buildings and Works" (February 2014).
- Attend all site meetings, site walks and visits
- Receive and respond to Contractors and/or Specialist's Requests for Information (RFI) providing additional design input and/or clarification where required
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- On request from the Employer's Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents

- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Report to Employers Representative as required

The person identified as the lead/senior project Civil/Structural Engineer will be required to attend all site meetings and walks. The Civil/Structural Engineer may not issue instructions to the contractor. All Instructions must be issued in writing by the Employers Representative.

6.5 Landscape Architectural Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend site meetings with the contractor the rest of the ALDT as necessary
- Attend CA meeting with the rest of the ALDT as necessary
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- If required, carry out all necessary supervision of the works (Landscaping) for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014 if / as required.
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- On request from the Employer's Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents
- Report to Employers Representative as required

The person identified as the lead/senior project Civil/Structural Engineer will be required to attend all site meetings and walks. The Civil/Structural Engineer may not issue instructions to the contractor. All Instructions must be issued by the Employers Representative.

6.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013.
- Advise and provide all necessary clarification and document to the ALDT to allow the timely progression of construction
- Carry out monthly site inspection of the construction works and issue a report of all finding/observation and concerns
- Monitor the performance of the PSCS and report any findings to the CA.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.

6.7 Planning and Environmental Consultancy Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.8 Traffic & Transport Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.9 Archaeology Consultancy Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.10 Assigned Certifier

- As part of the Inspection plan, and before the commencement of work on site, agree with The Employer and the Contractor an Inspection Notification Framework (INF), taking account of the building works involved and other factors.
- Before signing the form of Undertaking by the Assigned Certifier, exercise reasonable skill, care and diligence in checking that the documentation is appropriate for lodgement with the Commencement Notice.
- Schedule and obtain Ancillary Certificates from others. Coordinate, compile, and schedule relevant information to be submitted to the Building Control Authority as required under the regulations.
- In consultation with the members of the design team, plan and oversee the implementation of the Inspection Plan during Construction. On completion provide the Inspection Plan as implemented.
- Develop and agree wording of all certificates required.
- Co-ordinate and collate all certification of compliance (sub-certificates, ancillary certificates, warranties and tests as set out in the Inspection Plan) including for completion in conjunction with the Builder.
- On termination or relinquishment of appointment make available to the Building Owner all certification prepared and inspection reports carried out.
- Act as the single point of contact with the Building Control Authority during construction, including responding to requests for additional information by the Building Control Authority.
- Seek advice from the Building Control Authority, in respect of compliance matters relating to the building or works where disputes or differences of opinion arise between the parties to the project.
- Coordinate the inspection of the works by themselves and others and to certify the works on completion. Maintain records of inspection.

7 Stage 5 – Handover and Defects Period

7.1 Architectural Services

- Act as DTL
- Oversee snagging process as required, confirm progress to CA on ongoing basis.
- Obtain as-built drawings from the contractor; review and if acceptable transfer full documentation package to CA on CD including as built Architectural, M&E, Civil/Structural and Specialist drawings (else pursue contractor for required revisions/updates).
- Oversee and monitor completion of all post Practical Completion landscaping activities and services.
- Pass on relevant recommendations for the ongoing maintenance and care.
- As Employers Representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Determine any extensions of time under the contract.
- Arrange handover procedure, including final as built drawing issued to the contractor at the construction stage
- Arrange handover of the individual system and manufacturers' manuals and advise on maintenance contracts to enable the CA to operate and maintain the works
- Monitor agreement of the final account and issue report to the CA.
- Ensure snags or other defects which require urgent / immediate attention during the defects period are acted upon and closed-out.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- One month before the end of the defects periods as set out in the construction contracts(s), inspect the site and compile a list of defects in the works and issue a schedule of defects/snags to the CA for review if required, and issue to the Contractor.
- Liaise with contractor for close out all outstanding claims under contract
- Coordinate inspection at the end of the defects period
- Make recommendation on further retention of monies
- Prepare final report for issue to CA including lessons learnt
- Ensure accurate and complete as-built information including all operating manuals is provided to the CA on a timely basis.
- Administer retention period post Practical Completion including
 - Undertake final snagging of projects and close out of same to release final retention
 - Liaise with specialist as necessary to resolve issues

7.2 Mechanical & Electrical Engineering Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.

- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.3 Quantity Surveying Services

- Negotiate and agree Main Contract Final Accounts including all Contractor claims, variations and extras instructed by the Design team.
- Liaison with Design Team and Client on Post Contract Issues.
- Produce a full Final Account Report for the CA.
- Make available relevant, key personnel to the CA in the event of the Controller Auditor General and/or the Public Accounts Committee or other publicly appointed body wishing to discuss the public sector aspects of the procurement.
- Liaise with Contractor and client at the end of the defects liability period to ensure that Final Account / Final Statement is agreed. It is envisaged that the defects liability period will be 15 months.
- Conduct a design review, including Analysis of Outturn Cost and operation risk review, for submission to Employer.

7.4 Civil & Structural Engineering Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.5 Landscape Architectural Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and

report to the CA as required.

- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, notwithstanding any inconsistent Contract contents.
- Liaise with DTL, ALDT members and the contractor in relation to the provision of the Safety File to include Health & Safety risk assessments, Operation & Maintenance files (O&Ms), as-built drawings, detailed technical specifications, Specialist works as-built drawings and specifications, all results of specialist's test or any other tests carried out during the course of the project, Maintenance Specifications or other relevant documentation.
- The Safety File should include all relevant information to enable the building to be occupied and maintained safely and future changes to be made with full knowledge of the hazards and risks. Where appropriate it should incorporate details of the building, or the mechanical and electrical services systems, manufacturers' operational instructions, supplier references, checklists, test certificates and other maintenance details.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- The Employer's Representative should check with the PSDP before issuing the Substantial Completion Certificate. All substantive elements (sufficient to allow safe occupation of the building) of the Safety File should be complete before Substantial Completion, and any supplementary information must be in place within three months of that date.
- Where substantive elements of the Safety File are incomplete due to the failure of the Contractor or Project Supervisor (Construction Stage) to cooperate or provide the requisite information, the PSDP should so advise the Employer's Representative who should not issue Substantial Completion until the relevant information is provided.

7.7 Planning and Environmental Consultancy Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.8 Assigned Certifier

- At completion stage, submit the following to the Building Control Authority:
 - Certificate of Compliance on Completion signed by the Builder (at Part A) and by the Assigned Certifier (at Part B)
 - Plans, calculations, specifications and, showing how the completed building has achieved compliance with the Building Regulations must be lodged on the Building Control Management System when the Certificate of Compliance on Completion is submitted or at an earlier date. Where design documents have changed or supersede design documents previously lodged with the Building Control Authority with the Commencement Notice or later, any such difference should be clearly identified
 - The Inspection Plan as implemented by the Assigned Certifier in accordance with this Code of Practice.

7.9 Multi-Disciplinary Services on Handover

7.9.1 Final Account Report

- After receipt of the Final Statement the Final Account must be agreed and the Employer's Representative shall issue to the Client a Final Account Report including a Quantity Surveyor's Report. Timelines for this activity are to be agreed on a project by project basis.
- The ALDT, PM and QS recommendation for payment of the adjusted Contract Sum must be detailed in this report with the following appendices:
 - The summary section only of the Draft Final Account.
 - Quantity Surveyor's Final Account Report.
 - Written Confirmation from the Project Supervisor Design Process and the Client that the completed Safety File has been handed over to the Client.
 - A copy of the Architect's Opinions on Compliance of the Works with Planning and Development Acts and with the Building Regulations.
 - Copies of all guarantees provided for in the Contract Documents.

7.9.2 Defects Period

- On completion of the Defects Period, the IDT must agree and confirm in writing to the Client that the work is complete, and all defects have been corrected within this period.
- The final certificate can now be issued.
- Phasing may be required subject to the project programme.

7.9.3 Final Account Report Supplement

The ALDT must submit a Final Project Report to the Client on completion of the Defects Period, subject to agreement with the client that all defects have been addressed. This report should include the following Supplement to the Final Account Report:

- The summary section only of the agreed Final Account.
- Written confirmation of both Client and IDT that the work is complete, and all defects have been corrected within the Defects Period.

- The Architect's Report on the Building Works and the Contractor's performance during the Building Contract.
- Civil/Structural Engineer's Report on the civil/structural works and the quality of the work.
- Building Services Engineer's Report on the Mechanical and Electrical Services, and the quality of the Mechanical and Electrical installation

8 General Services for All Stages

8.1 Fire Safety Engineering

- Fire Safety Engineering design services are included in the Design Team for all stages of the project.
- Design Stages:
 - Provide general advice on the need to obtain a Fire Safety Certificate, comply with Building Regulations and with other statutory requirements
 - Provide enough preliminary information in relation to the project in the form of advice, sketch drawings, schematic layouts, reports or outline specifications to enable the lead designer to prepare outline proposals, concept proposals, developed design proposals and detailed design proposals
 - Obtain from and discuss with our other consultants' proposals, designs and outline specifications as to architectural, civil and structural, mechanical and electrical elements and requirements and co-ordinate these requirements with the fire safety engineering solution.
 - In conjunction with our other consultants, assist the architect in the preparation of a Preliminary Design Report and Cost Plan in respect of the final scheme design, illustrating the scheme in scale plans, sections and elevations and specifications in sufficient detail to enable The Client to approve spatial arrangements, materials and appearance, and reporting as to all the above issues required to be dealt with under this work stage.
 - Formally confirm that the architectural drawings are compliant with the fire safety regulations and with your advice and that a fire safety certificate can be obtained based on the architectural layouts.
 - Review the Architectural Design at each design iteration and confirm that the fire safety engineering requirements are incorporated
 - Review the M&E Design at each design iteration and confirm that the fire safety engineering requirements are incorporated in the design document.
 - Review the Civil and Structural Design at each design iteration and confirm that the fire safety engineering requirements are incorporated in the design document.
 - Review of the design proposals and advising on any necessary changes vis-à-vis the achievement of compliance with relevant requirements of Part B (Fire) of the Second Schedule to the Building Regulations.
 - Advising the Architects and other members of the design team on the information required for inclusion with the Fire Safety Certificate Application/Report if required as part of the project.
 - Preparation of fire engineering analysis for those aspects of the design which deviate from the recommendations in the guidance documents.
 - Advise the Design Team of a Fire Strategy dealing with any fire safety engineering aspects of the design, exploring alternative solutions and identifying any possible alternative

- options. This will include fire engineering analysis and modelling of maximum compartment size, fire growth, smoke movement and occupant response.
- Advise the Design Team on detailed design and specification of all items arising from the fire safety requirements of the project. These include, but are not limited to doors, wall construction, ceiling construction, floor coverings, service routes, ducts, alarms, smoke and heat detectors and suitability of building materials generally where they are material to fire safety aspects of the project.
 - Advise the Design Team of specific functions and/or elements of accommodation within the design which affect fire safety e.g. storage of waste, gases, fuels, location of vents, effect of deliveries.
 - Commission Computational Fluid Dynamic studies where required to prove the design proposal.
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Existing means of escape and required alterations – location, number, size, specification of stair cores and access/egress points; travel distances; protected escape routes; phasing proposals.
 - Construction – fire resistance of new structure, compartmentation.
 - Elevations – distance to relevant boundaries and requirements for fire rating elevations if required.
 - Existing Fire Fighting Facilities and required alterations to these– means of fighting fire and the need for hydrants around the site, firefighting access roadways, internal fire mains, testing, maintenance and storage of equipment etc.
 - Active Fire Safety Systems – requirements for smoke control requirements such as venting, emergency lighting, fire detection and alarm etc.
 - Site wide fire safety issues relating to the interaction of the building with other areas of the site.
 - Examining and investigating options for alternative uses within fire strategy.
 - Investigating multi occupancy layouts and use of building in relation to fire strategy.
 - Fire Certificate application and associated process:
 - Consult as necessary with Building Control authorities, the Fire Brigade and statutory undertakers about any matters of principal in connection with the design of the project.
 - Preparation of Fire Safety Certificate Compliance Reports for the building including relevant drawings for submission for an application for a Fire Safety Certificate and other relevant support information, demonstrating compliance with the relevant requirements of Part B (Fire) of the Building Regulations.
 - Consultations / negotiations as necessary with the Building Control Authority during the course of their consideration of the Fire Safety Applications.
 - Duly respond to all requests from the local authority for additional information during the planning application process.

- Produce amended drawings, analysis, modelling and reports in response to RFI, clarifications/modifications, and appeal(s) as required.
 - Preparation of additional information as may be required by the Local Authority Fire Department, including further fire engineering analysis and computer modelling as necessary.
 - Making the applications for Fire Safety Certificates to the relevant local authorities.
 - Produce amended drawings in response to oral hearing information and further information on queries and clarifications if required. Attendance at legal briefings, design team meetings, oral hearing, and preparation of witness statement and any related services.
 - Tender Document
 - Arrange for a detailed review with the Architect and the Client of the Fire Safety Engineering drawings and specifications, and formally confirm that they have been prepared in accordance with the agreed brief and that they are consistent with the architectural drawings.
 - Revise as necessary the Fire Safety Engineering documentation following the above detailed review with the Architect and the Client and submit revisions for Client/ Project Manager Approval.
- Construction
 - The Consultant shall provide further information as is reasonably necessary, in his opinion, to enable contractors and/or sub-contractors to prepare installation drawings.
 - The Fire Safety Engineering designer shall examine installation drawings, shop drawings and builders work details submitted by contractors and/or sub-contractors for the fire safety works or parts thereof to ensure compliance with building regulations, standards and the fire safety certification documentation.
 - The Fire Safety Engineering designer shall advise The Client through the lead consultant on the need for special inspections or tests arising during the construction of the Works.
 - The Consultant shall assist the rest of the professional team in examining Contractors' and/or Sub-contractors' proposals as may be required by contracts for the Works.
 - Assist in providing a response from the design team and advise on the effects of a proposed change to the design of the project, in accordance with the change control procedures.
 - The Fire Safety Engineering designer shall examine the proposals of Contractors or Sub-Contractors for carrying out commissioning procedures and performance testing in relation to the fire safety works. Comment to The Client on any requirements of these proposals affecting the programme for the Works
 - Provide information to, discuss proposals with and co-ordinate your production information with the input of our other consultants and of any relevant specialists.
 - The Fire Safety Engineering designer shall examine the results of commissioning and the documentary records. Inspect the Works on completion and, in conjunction with the professional team, record any defects. Obtain from the Contractor all test and commissioning reports required to verify the correct operation of the systems involved, having witnessed commissioning test where appropriate and commissioning reports and confirm that this work has been completed satisfactorily. Review and approve the certificates for design, installation and commissioning / completion, furnished by others,

- in respect of all fire safety elements e.g. fire stopping, structural fire protection, fire door sets, life safety systems (fire detection and alarm, PA, CCTV, smoke control system etc.).
- Inspect the site as required in the Inspection Plan and issue the corresponding inspection reports recording progress, quality and cost. Monitor that defects identified are being corrected by the contractor.
 - Where necessary advise on the need for any additional inspections and/or tests required. Where appropriate propose recommended suppliers, provide brief and obtain costs for the provision of such additional tests.
 - As appropriate make recommendations for sample-taking and the carrying out of tests of materials and workmanship and examine the conduct and results of such tests whether on or off-site.
 - As appropriate make recommendations for the opening up of work to determine that it is generally in accordance with the Building Contract.
 - Carry out regular visits to the works for the purpose of supervision, monitoring and inspection, to confirm that the fire safety works are being carried out in accordance with the Contract
 - In conjunction with the other consultants, review and comment on Contractors, sub-contractors or Specialists' proposals and programmes for commissioning and performance testing of the works. Where required, witness commissioning and testing.
 - Carry out inspection of the fire safety engineering works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Contract Administrator and Project Manager of all snags and defects identified for issue to the Contractor. Carry out inspection of the remedial works upon notification of their completion by the Contractor.
 - If reasonably requested to do so, inspect materials delivered to Site.
 - If reasonably requested to do so, visit the sites of fabrication and assembly of structural elements to inspect such materials and workmanship before delivery to the Site.
 - Assist in evaluation of any outstanding works still to be completed prior to confirmation of Practical Completion.
 - On request from the Contract Administrator, provide certification that the fire safety engineering works have reached Practical Completion.
 - Preparation & submission of an Opinion of Compliance with the relevant requirements of Part B (Fire) of the Building Regulations.
 - Provide Ancillary Certifier's Certificates on completion to the assigned certifier and the client.
- Handover, Close out and post occupancy Services:
 - Inspect the Works and prepare a snagging report in the period leading up to practical completion of the Works and/or any section thereof under the Building Contract. Confirm to The Client in writing whether any significant items of work exist which may prevent the Works or any such section thereof from satisfying the requirements of practical completion under the Building Contract.
 - Development and control of Fire Safety Management files for premises
 - Development of Fire Safety Management procedures for the premises.
 - Contribute to the timely completion of the 'punch list' items on the project.
 - Attend and contribute to post project evaluation.

- Provide advice and recommendations to the Client in relation to Building Maintenance as it relates to fire safety elements, and the training of the managers and maintenance staff who will be responsible for the operation, safety and maintenance of the new facility. Participate in training and maintenance seminar.
- Provide services required in connection with the Defects Liability Period under the Building Contract and the making good of defects. After Practical Completion and before the end of the defects' liability period, visit site with the Architect/Client to check operation of installations and advise regarding the correction of any operational difficulties that may exist. Issue report on this visit to all parties.
- In conjunction with Other Consultants, monitor the Project Defects Liability Period. Compile a list of defects of work, one month before the end of the Defects Liability Period and issue coordinated Project Team's defects list to the contractor. During Defects Liability Period instruct the Contractor on any urgent defects that require immediate attention.

8.2 Disability Access Engineering

- Disability Access Engineering design services are included in the Design Team for all stages of the project.
- Design Stages:
 - Provide general advice on the need to obtain a Disability Access Certificate, comply with Building Regulations and with other statutory requirements.
 - Advise on the implementation of universal design standards.
 - Provide enough preliminary information in relation to the project in the form of advice, sketch drawings, schematic layouts, reports or outline specifications to enable the lead designer to prepare outline proposals, concept proposals, developed design proposals and detailed design proposals
 - Obtain from and discuss with our other consultants' proposals, designs and outline specifications as to architectural, civil and structural, mechanical and electrical elements and requirements and co-ordinate these requirements with the disability access engineering solution.
 - In conjunction with our other consultants, assist the architect in the preparation of a Preliminary Design Report and Cost Plan in respect of the final scheme design, illustrating the scheme in scale plans, sections and elevations and specifications in sufficient detail to enable The Client to approve spatial arrangements, materials and appearance, and reporting as to all the above issues required to be dealt with under this work stage.
 - Formally confirm that the architectural drawings are compliant with the disability access regulations and with your advice and that a disability access certificate can be obtained based on the architectural layouts.
 - Review the Architectural Design at each design iteration and confirm that the disability access engineering requirements are incorporated. Advise on potential design improvements aligned universal design requirements.
 - Review the M&E Design at each design iteration and confirm that the disability access engineering requirements are incorporated in the design document.
 - Review the Civil and Structural Design at each design iteration and confirm that the disability access engineering requirements are incorporated in the design document.

- Review of the design proposals and advising on any necessary changes vis-à-vis the achievement of compliance with relevant requirements of Part M, Part K and all relevant parts of the Second Schedule to the Building Regulations.
- Advising the Architects and other members of the design team on the information required for inclusion with the Disability Access Certificate Application/Report if required as part of the project.
- Preparation of disability access engineering analysis for those aspects of the design which deviate from the recommendations in the guidance documents.
- Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Existing means of escape and required alterations – location, number, size, specification of stair cores and access/egress points; travel distances; protected escape routes; phasing proposals.
- Disability Access Certificate application and associated process:
 - Consult as necessary with Building Control authorities and statutory undertakers about any matters of principal in connection with the design of the project.
 - Preparation of Disability Access Certificate Compliance Reports for the building including relevant drawings for submission for an application for a Disability Access Certificate and other relevant support information, demonstrating compliance with the relevant requirements of Part M and associated part of the Building Regulations.
 - Consultations / negotiations as necessary with the Building Control Authority during the course of their consideration of the Application.
 - Duly respond to all requests from the local authority for additional information during the planning application process.
 - Produce amended drawings, analysis, modelling and reports in response to RFI, clarifications/modifications, and appeal(s) as required.
 - Preparation of additional information as may be required by the Local, including further analysis as necessary.
 - Making the applications for Disability Access Certificate to the relevant local authorities.
 - Produce amended drawings in response to oral hearing information and further information on queries and clarifications if required. Attendance at legal briefings, design team meetings, oral hearing, and preparation of witness statement and any related services.
- Tender Document
 - Arrange for a detailed review with the Architect and the Client the drawings and specifications, and formally confirm that they have been prepared in accordance with the agreed brief and that they are consistent with the disability access certificate granted.
- Construction
 - The Consultant shall provide further information as is reasonably necessary, in his opinion, to enable contractors and/or sub-contractors to prepare installation drawings.

- The Disability Access Designer shall examine installation drawings, shop drawings and builders work details submitted by contractors and/or sub-contractors for the relevant works or parts thereof to ensure compliance with building regulations, standards and the disable access certification documentation.
- The Disability Access Designer shall advise The Client through the lead consultant on the need for special inspections or tests arising during the construction of the Works.
- The Consultant shall assist the rest of the professional team in examining Contractors' and/or Sub-contractors' proposals as may be required by contracts for the Works.
- Assist in providing a response from the design team and advise on the effects of a proposed change to the design of the project, in accordance with the change control procedures.
- The Disability Access Designer shall examine the proposals of Contractors or Sub-Contractors for carrying out commissioning procedures and performance testing in relation to part M and granted disabled access certificate. Comment to The Client on any requirements of these proposals affecting the programme for the Works.
- Provide information to, discuss proposals with and co-ordinate your production information with the input of our other consultants and of any relevant specialists.
- The Disability Access Designer shall examine the results of commissioning and the documentary records. Inspect the Works on completion and, in conjunction with the professional team, record any defects. Obtain from the Contractor all test and commissioning reports required to verify the correct operation of the systems involved, having witnessed commissioning test where appropriate and commissioning reports and confirm that this work has been completed satisfactorily. Review and approve the certificates for design, installation and commissioning / completion, furnished by others in respect of all disability access elements e.g. disabled refuge calling stations, automated opening devices etc.
- Inspect the site as required in the Inspection Plan and issue the corresponding inspection reports recording progress, quality and cost. Monitor that defects identified are being corrected by the contractor.
- Where necessary advise on the need for any additional inspections and/or tests required. Where appropriate propose recommended suppliers, provide brief and obtain costs for the provision of such additional tests.
- As appropriate make recommendations for sample-taking and the carrying out of tests of materials and workmanship and examine the conduct and results of such tests whether on or off-site.
- As appropriate make recommendations for the opening up of work to determine that it is generally in accordance with the Building Contract.
- Carry out regular visits to the works for the purpose of supervision, monitoring and inspection, to confirm that the relevant works are being carried out in accordance with the Contract
- In conjunction with the other consultants, review and comment on Contractors, sub-contractors or Specialists' proposals and programmes for commissioning and performance testing of the works. Where required, witness commissioning and testing.
- Carry out inspection of the relevant works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Contract Administrator and Project Manager of all snags and defects identified for issue to the Contractor. Carry

out inspection of the remedial works upon notification of their completion by the Contractor.

- If reasonably requested to do so, inspect materials delivered to Site.
- If reasonably requested to do so, visit the sites of fabrication and assembly of structural elements to inspect such materials and workmanship before delivery to the Site.
- Assist in evaluation of any outstanding works still to be completed prior to confirmation of Practical Completion.
- On request from the Contract Administrator, provide certification that the disabled access and Part M works have reached Practical Completion.
- Preparation & submission of an Opinion of Compliance with the relevant requirements of Part M (Access) of the Building Regulations.
- Provide Ancillary Certifier's Certificates on completion to the assigned certifier and the client.
- Handover, Close out and post occupancy Services:
 - Inspect the Works and prepare a snagging report in the period leading up to practical completion of the Works and/or any section thereof under the Building Contract. Confirm to The Client in writing whether any significant items of work exist which may prevent the Works or any such section thereof from satisfying the requirements of practical completion under the Building Contract.
 - Contribute to the timely completion of the 'punch list' items on the project.
 - Attend and contribute to post project evaluation.
 - After hand-over and before the end of the defect' liability period, visit site with the Architect/Client to check operation of installations and advise regarding the correction of any operational difficulties that may exist. Issue report on this visit to all parties.
 - In conjunction with Other Consultants, monitor the Project Defects Liability Period. Compile a list of defects of work, one month before the end of the Defects Liability Period and issue coordinated Project Team's defects list to the contractor. During Defects Liability Period instruct Contractor on any urgent defects, which require immediate attention.
 - At the end of the Defects Period, carry out a final defects' inspection, and on satisfactory completion of all defects, notify the Contract Administrator accordingly.

The LDA reserves the right to terminate the contract at any point throughout the process.



QUALIFICATION QUESTIONNAIRE

Establishment of a multi-party framework agreement for	Architect Led Design Team
Procedure	Restricted
eTenders RFT ID	176810
OJEU Ref	
Issue Date	Tuesday 22 nd September 2020
Closing Date for Queries	Thursday 14 th October 2020 at 17:00
Contact for Queries	Questions and Answers facility on www.etenders.gov.ie
Closing Date / Time for receipt of Completed Questionnaires	Thursday 22 nd October 2020 at 17:00
<i>Please note that information relating to this Qualification Questionnaire, including clarifications and changes, will be published on the Irish Government Procurement Opportunities Portal (www.etenders.gov.ie). Registration is free of charge and there is no charge for documents. Please note that the Contracting Authority cannot accept responsibility for information relayed (or not relayed) via third parties.</i>	



TABLE OF CONTENTS

1. Disclaimer	4
2. Summary	5
3. About the Contracting Authority	6
3.1 The Projects	6
4. Scope of the Framework Agreement	7
4.1 Numbers Admitted to the Framework Agreement.....	8
4.2 Duration of the Framework Agreement.....	8
4.3 Estimated Value of the Framework Agreement.....	8
4.4 Awarding Contracts under the Framework Agreement	8
4.5 Award to Runner Up	9
4.6 Use of the Framework Agreement.....	10
4.7 Specification of Requirements for Initial Contract under the Framework	10
4.7.1 The Tasks.....	10
4.8 Details of Contracts Arising Over Life of Framework Agreement	10
4.9 Award of Project Management Contracts and Design Team Contracts to same Economic Operator	11
5 Instructions to Applicants	12
5.1 General	12
5.2 Applicant Team.....	12
5.3 Consortia	12
5.4 Conflict of Interests	14
5.5 Queries.....	14
5.6 Submission of Applications.....	15
5.7 Closing date for Applications	15
5.8 Completing the Qualification Questionnaire.....	15
5.9 European Single Procurement Document.....	17
5.10 Evaluation of Applications.....	18
5.11 Clarification of Applications.....	18
5.12 Identification of Tender List.....	18
5.13 Freedom of Information Acts	18
5.14 Interference	19
5.15 Inducement to Purchase	19



APPENDIX A: QUALIFICATION QUESTIONNAIRE..... 20



1. Disclaimer

This document issued herewith (“the Document”) is for information only and does not constitute, and shall not be interpreted as, an offer for sale, prospectus, or the basis of a contract.

Applicants are recommended to read the documents thoroughly. While all reasonable steps have been taken to ensure that the information set out in the Document is accurate and up to date, no representation or warranty, express or implied, is or will be made or given in relation to the accuracy or the completeness of any information contained in the Document or otherwise provided by or on behalf of the Contracting Authority (in writing or otherwise) to any interested party or its advisers. No responsibility or liability for any loss or damage arising as a result of reliance on these documents, or for the information contained in these documents or for any omission is or will be accepted by the Contracting Authority or by any of its officers, employees, agents or professional advisers. No officer, employee, agent, or professional adviser of the company has any authority to give or make any representation or warranty, express or implied, in relation to such information. The Contracting Authority’s officers, employees, agents and professional advisers expressly disclaim any and all liability arising out of such documentation or information and any errors or omissions in or from the documents and information.

The Contracting Authority reserves the right to discontinue the procurement process at any time.



2. Summary

Contracting Authority	Land Development Agency
Nature of Procurement	Architect Led Design Team
Type	Services
Procedure	Restricted Procedure
Stage in procedure	<p>This is the first stage of this competitive procedure whereby any interested party may submit a response to this Questionnaire in order to be considered for inclusion on the tender list.</p> <p>Following evaluation, the top eight (8) scoring applicants will be invited to tender, subject to that number meeting the minimum requirements.</p> <p>Following evaluation of that tender, the tenderer having submitted the most economically advantageous tender will be awarded the initial contract and the tenderers having submitted the top five ranking tenders will be admitted to the multi-party framework agreement.</p>
Selection Criteria	As contained in Appendix A to this Document.



3. About the Contracting Authority

The Land Development Agency (LDA), established in September 2018, is a key Government land management initiative.

Its objectives are to:

- Coordinate appropriate State lands for regeneration and development, opening up key sites for housing delivery.
- Driving strategic land assembly, working with both public and private sector land owners.
- Contributing towards the delivery of affordable housing; and
- Become a leading influencer of housing and land management, through research and innovation.

The LDA will be underpinned by grounding legislation and is overseen by an independent board of directors. The Government has committed to providing the LDA with equity capital of up to €1.25 billion.

3.1 The Projects

The LDA are exploring several development projects and strategic development areas including at the following sites:

Pipeline Site	Projected Units
Dyke Road	250
Kilbarry, Cork	3,000
Bricins / Arbour Hill	400
Site 1, Cork Docks	600
Site 2, Cork Docks	400
East Wall, Dublin Port	200
St Teresa's Gardens, Dublin	750
Sandy Road	500
Cherryorchard	1,000
Leinster Region, location undisclosed.	1,500
Leinster Region, location undisclosed.	800
Munster Region, location undisclosed.	200
Leinster Region, location undisclosed.	180
Leinster Region, location undisclosed.	500
Leinster Region, location undisclosed.	2,500
Total	12,780

It should be noted that this list is not exhaustive, and the LDA reserve the right to add or remove projects from this list throughout the duration of the Framework Agreement.



4. Scope of the Framework Agreement

The Contracting Authority proposes to engage in a competitive process for the establishment of a framework agreement for Architect Led Design Team Services.

A framework agreement constitutes a means of establishing overall terms and conditions in accordance with which, for a specified duration, individual contracts may or not be awarded. In the case of a multi-party framework agreement, contracts will be awarded in accordance with the process outlined herein.

It is emphasised that a framework agreement constitutes no guarantee to purchase a specific quantity of supplies or services from a particular economic operator. Indeed, the Contracting Authority reserves the right to operate outside of the framework agreement at its discretion, particularly should it become apparent that doing so would offer greater value for money. Notwithstanding the foregoing, the framework agreement approach has been adopted in order to leverage efficiencies and maximise cost savings over the duration of the framework.

The framework will be delivered in two lots:

- Lot 1 – Architect-led design team framework for a development of projects exceeding 300 units of accommodation (or development equivalent).
- Lot 2 – Architect-led design team framework for a development of projects 300 units of accommodation and less (or development equivalent).

In response to this questionnaire tenderers must confirm their preferred Lot, suppliers will not be permitted on both.

The Architect Led Design Team will comprise

- a) Architectural Services (incl. Design Team Leader, conservation, masterplan & urban design, fire safety design services, disability access design services, employer's representative for the Works Contract and design certifier as defined under the Building Control (Amendment) Regulations 2014).
- b) Civil & Structural Engineering Services
- c) Quantity Surveying Services
- d) Mechanical, Electrical & ICT Engineering Services
- e) Landscape Architectural Services
- f) Project Supervisor for the Design and Construction Process
- g) Planning & Environmental Consultant
- h) Traffic Management Services
- i) Archaeological Services
- j) Other ancillary design and consultancy services as required



The architectural services consultant will be the design team lead and will act as the single point of contractual responsibility, with the remaining key disciplines providing collateral warranties for the benefit of the Contracting Authority.

4.1 Numbers Admitted to the Framework Agreement

The framework agreement will be established as a multi-party framework agreement with five (5) number of operators for each Lot, subject to sufficient numbers meeting the minimum requirements. While Applicants may submit an application/tender for both lots, they will only be appointed to one lot. Applicants must confirm their preferred lot in response to the qualification questionnaire

4.2 Duration of the Framework Agreement

The maximum duration of the framework agreement will be three [3] years subject to satisfactory annual review of performance. This may be extended for one [1] additional year.

For the avoidance of doubt, the Contracting Authority confirms that the period of any contracts awarded under the framework agreement may extend beyond the date of expiry of the agreement.

4.3 Estimated Value of the Framework Agreement

The estimated total value of purchases pursuant to the framework agreement for:

- Lot 1 is in the region of €50m (ex. VAT) over the lifetime of the agreement.
- Lot 2 is in the region of €25m (ex VAT) over the lifetime of the agreement.

It is emphasised, however, that this figure is provided strictly for indicative purposes only as there is no guaranteed expenditure under the framework agreement.

4.4 Awarding Contracts under the Framework Agreement

Individual contracts may be awarded as follows:

(a) A mini-tender competition will be conducted with all firms admitted to the framework agreement for the relevant lot, depending on project size. On each occasion a Request for Tender will be issued detailing the scope of requirements, the award criteria and a closing date and time. As previously noted firms can only be admitted to one lot of the framework and will only be invited to tender for projects within that lot.

(b) In circumstances where a mini tender competition is run between the members of the Framework as described above, and a competition is not successfully concluded, for example, where no tenders are received, or the tenders received are not capable of acceptance for any reason, the Contracting Authority reserves the right to consult any member of the Framework regarding proposals for performing the required Services and to directly award the required Services to such member



where this is the most expedient way to proceed, taking into account any relevant considerations.

(c) In circumstances where any Services required by the Contracting Authority under this Agreement comprise (a) the repetition of similar Services (i.e. that is services relating to the same project) previously performed for the Contracting Authority by a member of the Framework, or (b) an amendment or termination of arrangements in respect of which a member of the Framework previously advised or provided Services, the Contracting Authority reserves the right to directly award the required Services to such member where this is the most expedient way to proceed, taking into account any relevant considerations such as the need to ensure continuity of the services and affordability.

(d) The Contracting Authority reserves the right to directly award Services to any member of the Framework, within the relevant lot, if it considers it necessary to do so in respect of particular matters, having regard to timing, availability and expertise of resources, conflicts of interest and such other criteria as it considers relevant to such matters.

(e) The Contracting Authority may, from time to time, obtain specific specialist services, up to a value of €25,000, that are covered by this Framework directly from one of the firms admitted to the framework agreement in accordance with Recital 61 of Directive 2014/24/EU.

(f) Within each separate Lot there will also be an allowance for a cascading (rotational) framework for work up to a value of €50,000. This work may include but is not limited to due diligence, feasibility studies, site assessment, block planning for site evaluation purposes etc. This will be a five party rotational arrangement with all framework members with the first appointment to go to the top ranked member, second appointment to the second placed and so on to the fifth ranked. Candidates on the panel who are consistently unable to undertake the works or fail on the pre-set KPI targets may be removed from the panel.

(g) The Contracting Authority reserves the right to amalgamate sites to form a single project for mini-tender competition where efficiencies can be gained and this is deemed advantageous to the LDA, for example, due to scope, programme, location etc.

4.5 Award to Runner Up

If for any reason, it is not possible to establish the framework agreement or award the initial contract to the designated successful tenderer emerging from this competitive process; the Contracting Authority reserves the right to establish the framework with



the next highest scoring tenderer based on the terms advertised at any time during the tender validity period. This shall be without prejudice to the right of the Contracting Authority to cancel this competitive process and/or initiate a new contract award procedure at its sole discretion.

Likewise, if having awarded a contract under the framework, the Framework Member cannot, for whatever reason, deliver the required services to the satisfaction of the Contracting Authority; the Contracting Authority reserves the right to terminate the contract and their membership of the framework and to award the contract and framework membership by mutual agreement to the next highest-ranked tenderer on foot of the original procedure based on the terms advertised, at any time during the framework agreement tender validity period. This shall be without prejudice to the right of the Contracting Authority to cancel this competitive process and/or initiate a new contract award procedure at its sole discretion.

4.6 Use of the Framework Agreement

The Contracting Authority will use this framework agreement as and when requirements within its scope arise. However, there is no obligation upon the Contracting Authority to make use of this framework agreement. Notwithstanding this fact, the framework agreement may be terminated in accordance with the framework agreement terms and conditions, a draft version which will be appended to the tender document.

4.7 Specification of Requirements for Initial Contract under the Framework

The framework agreement will be established on foot of a competition for an initial contract, yet to be determined.

The initial contract will be awarded to the top scoring tenderer, for the relevant Lot, shortly after the formal establishment of the framework agreement.

4.7.1 The Tasks

The Design Team will provide a comprehensive range of services, including but not limited to: feasibility studies, master-planning services, new build residential projects delivered through traditional contracts, new build residential projects delivered via design & build contracts, area regeneration projects, residential retro-fit/refurbishment projects, conservation projects & works to protected structures, small works, public realm and precinct improvements, public buildings, technical due diligence services etc.

4.8 Details of Contracts Arising Over Life of Framework Agreement

The Contracting Authority intend to appoint a Design Team to provide similar services for each project under their remit over the lifetime of the Framework.



4.9 Award of Project Management Contracts and Design Team Contracts to same Economic Operator

It is anticipated that the Contracting Authority will separately procure Project Management Services, Assigned Certifier and Property Advisory Services to act on their behalf.

For avoidance of doubt, companies may be appointed to both Frameworks, but where a successful tenderer is appointed as Design Team to a specific project, no member of their team will be permitted to be appointed as Project Manager to that project.



5 Instructions to Applicants

Every effort has been made to ensure that this Document contains all the necessary information for the completion of applications. The Contracting Authority does not warrant or represent that this Document, or any other information given to Applicants, is accurate or complete. No liability is accepted for any error, misstatement, or omission (negligent or otherwise) in this Document, or in any other information given to Applicants.

5.1 General

The Economic Operator submitting a PQQ Submission is referred to as the Applicant, regardless of whether it is a single company or organisation or a Consortium. The Applicant, if successful in being appointed to the Framework Agreement, will take contractual and organisational responsibility for delivering any resulting Contracts awarded.

5.2 Applicant Team

The Applicant must include the following disciplines within its team, evidence with respect to capacity will be assessed at this stage:

- a) Architectural Services (incl. Design Team Leader, conservation, masterplan & urban design, fire safety design services, disability access design services, employer's representative for the Works Contract and design certifier as defined under the Building Control (Amendment) Regulations 2014).
- b) Quantity Surveying Services
- c) Civil & Structural Engineering Services
- d) Mechanical, Electrical & ICT Engineering Services
- e) Planning & Environmental Consultant,

The Applicant must also include the following disciplines within its team, declarations with respect to capacity will be acceptable at this stage:

- f) Landscape Architectural Services,
- g) Visual Impact Assessment & Graphics,
- h) Project Supervisor for the Design and Construction Process,
- i) Traffic Management Services,
- j) Archaeological Services,
- k) Acoustic consultant services,
- l) Topographical and measured building surveys of existing buildings,
- m) Other ancillary design and consultancy services as required

5.3 Consortia

The Applicant can provide the role of any or all disciplines from within its own resources or by using Sub-Contractors. However, information in relation to all Sub-Contractors must be provided as requested in the PQQ. Where an Applicant lists more



than one entity for one of the disciplines listed above, the Applicant must identify the lead entity for that role in Question A1.2.

The Contracting Authority will require the successful Tenderer to structure itself so that the following legal and organisational requirements are met:

- (a) the successful Tenderer is the single point of contact that takes direct contractual responsibility for interfacing with the Contracting Authority in managing and delivering the Contract, and
- (b) the legal obligations and liabilities of the successful Tenderer are borne by the Economic Operator(s) which satisfy the financial and economic requirements referred to in this Document.
- (c) all Consortium Members must provide joint and several liability to the Contracting Authority for the performance and fulfilment of the terms of the Contract

If there is a change to the Applicant's Team following the date for PQQ Submission and prior to the submission of the Tender, it must seek prior written approval for any change from the Contracting Authority by:

- (a) explaining in writing to the Contracting Authority the reasons for any change; and
- (b) providing full details of any proposed replacement (which will entail the completion of the relevant PQQ questions (if applicable) and the score awarded must be equal to or higher than that attained by the Consortium Member/Other Entity/Sub-Contractor being replaced)

The Contracting Authority will consider a request for approval of such changes only if it is received at least 21 calendar days prior to the relevant submission deadline

Applicants should note that, for any proposed change to their Applicant's Team to be considered by the Contracting Authority, it must be supported by robust reasoning and any replacement must be assessed by the Contracting Authority as being at least equal, in all respects, to the team member being replaced. The decision on whether or not to allow a change in the Applicants Team is a matter for the sole discretion of the Contracting Authority.

Prior to the commencement of the Framework Agreement, the successful Tenderer will be required to notify the Contracting Authority of the name, contact details and legal representatives of all its Sub-Contractors involved in the delivery of the Project, in so far as is known to the successful Tenderer at the time. The successful Tenderer will also be required to notify the Contracting Authority of any changes to the information provided in respect of its Sub-Contractors during the course of the Contract and the name, contact details and legal representatives of any new Sub-



Contractors which the successful Tenderer subsequently involves in the delivery of the Project

5.4 Conflict of Interests

The Contracting Authority recognises that an adviser, Sub-Contractor, consultant, funder, servant or agent to an Applicant or a Consortium Member may seek to participate in, advise or carry out work in relation to more than one bidding team for this Framework. Any adviser, Sub-Contractor, consultant, funder, servant or agent seeking to participate on more than one bidding team, prior to agreeing to any involvement with another bidding team, must receive written approval from the Contracting Authority permitting such involvement (including, inter alia, any conditions attached to such involvement).

If a member of an Applicants' Team is likely to have knowledge of the price or other aspects of the Applicants' tender that could cause it to have a conflict of interest and give rise to a risk of collusion if it also participated in another Applicants' team. If an Economic Operator is considering participating in this way, it must put in place appropriate safeguards to ensure that there is no conflict of interest or collusion in relation to this Procurement Process.

All members of the Applicant's Team must provide a conflict of interest declaration in A8. The Contracting Authority reserves the right to request evidence of such safeguards and/or to decide that an Economic Operator has not put in place sufficient safeguards and therefore is not permitted to participate further in the Procurement Process.

5.5 Queries

Requests for additional information and clarification on any matters must be made via the Questions and Answers facility on www.etenders.gov.ie. All clarifications/additional information will be issued via the etenders website (www.etenders.gov.ie) and will be made available to all potential Applicants who have noted their interest on the etenders website. Please submit queries as soon as possible.

The closing date for queries	Is 17:00hrs, Thursday 15 th October 2020.
Process for submitting queries	Via www.etenders.gov.ie only

In circulating responses, queries will be edited to avoid disclosing the identity of the querist and will be circulated to all parties who have expressed an interest in the procurement on the eTenders website.



5.6 Submission of Applications

The Contracting Authority is using the tender Postbox facility and applications must be submitted electronically via the etenders postbox facility on www.etenders.gov.ie only. Applicants must ensure that they give sufficient time to upload their response. All applications submitted in soft copy must be compiled such that they can be read immediately using PDF readers.

The Contracting Authority is not responsible for corruption in electronic documents. Applicants must ensure electronic documents are not corrupt.

Applicants should produce their response as TWO SEPERATE FILES, One for the Financial Submission & One for the Quality Submission which is clearly labelled, page numbered and indexed.

5.7 Closing date for Applications

The closing date for Applications	is 17:00hours Thursday 22 nd October 2020.
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Applicants must ensure that they give themselves sufficient time to upload and submit all required documentation before the closing date/time. Applicants should take into account the fact that upload speeds vary. There is a maximum of 2.14 GB for individual files sent to the electronic postbox and a one-hour limit for upload. In order to submit a document to the electronic postbox, please note that you must click "Submit Response". After submitting you can still modify and re-send your response up until response deadline. Applicants should be aware that the 'Submit Response' button will be disabled automatically upon the expiration of the response deadline.

It is the responsibility of the Applicant to ensure that their application is complete and is uploaded by the designated deadline. Applications that are received late or via other means WILL NOT be considered in this public procurement competition

NOTE: It is important to note that only persons who have downloaded and accepted a document can submit and upload. Also please leave sufficient time for upload of documents prior to the deadline as it is not possible to upload any material after this time.

5.8 Completing the Qualification Questionnaire

When completing the Qualification Questionnaire contained in Appendix A to this Document, Applicants should note the following conditions:

All questions must be completed in full and without reference to other documents or other parts of the Qualification Questionnaire.



Each member of the Applicants Design Team must complete the section of the Qualification Questionnaire relevant to their discipline.

All questions should be answered with relevance to the subject matter of this competition. For the avoidance of doubt, it is emphasised that the information requested in the Qualification Questionnaire is aimed solely at determining the suitability and choice of Applicants for entry to the competitive tendering stage. Only at that subsequent tendering stage will the selected tenderers be invited to tender in Application to the specific requirements of the contract in the light of the published award criteria and the Invitation to Tender document.

Where a 'Rule' is associated with a particular question, Applicants must satisfy the requirements of the rule in order to remain eligible for consideration in the competition.

Applicants are permitted to add lines to the pro-forma tables and boxes set out within the Qualification Questionnaire if required.

The Qualification Questionnaire must be completed in English and where copies of original documents are provided in languages other than English or Irish, a complete and accurate English translation should be provided, or the documents will not be considered during the evaluation process.

All financial information should be denominated in euro (€), except where financial information is being provided in a certified or audited supporting document such as a set of financial statements in which case it is sufficient for the information to remain in its original currency.

Failure to provide a sufficient level of detail or to explain adequately any relevant matters may result in such data or information not being taken into account during the evaluation process.

The Contracting Authority seeks to encourage participation on a fair and equal basis by Small and Medium Enterprises ("SME"s) in this Competition. SMEs that believe the scope of this Competition is beyond their technical or business capacity are encouraged, subject to this paragraph, to explore the possibilities of forming relationships with other SMEs or with larger enterprises. Through such relationships they can participate and contribute to the successful implementation of any Services Contracts that may result from this Competition and therefore increase their social and economic benefits.

Larger enterprises are also encouraged, subject to this paragraph, to consider the practical ways that SMEs can be included in their proposals to maximise the social



and economic benefits of any Services Contracts that may result from this Competition.

Where a group of undertakings (in whatever form and regardless of the legal relationship between them) come together to submit an application in response to this Qualification Questionnaire the Contracting Authority will deal with all matters relating to this Competition through the entity who will carry overall responsibility for the performance of the contract only (the "Prime Contractor"), irrespective of whether or not tasks are to be performed by a subcontractor or other consortium member (the "Subcontractor"). The Applicant must clearly and comprehensively set out the name, title, telephone number, postal address, facsimile number and email address of the nominated contact personnel of the Prime Contractor authorised to represent the Applicant and to whom all communications shall be directed and accepted until this Competition has been completed or terminated. Correspondence from any other person (including from any Subcontractor) will NOT be accepted, acknowledged or responded to.

Applicants are reminded that they may rely on the resources of other entities in order to establish the suitability requirements on condition that they can prove to the satisfaction of the Contracting Authority that they will have these resources at their disposal when necessary.

If the application is from a consortium / joint venture Applicants must ensure that all the relevant information is provided and where necessary, provide the information requested separately for each party.

Notwithstanding Section 5.4 above, Applicants are strictly prohibited from discussing any aspect of their Application to the Qualification Questionnaire with other Applicants or otherwise exchanging information or colluding in respect of the project. Any Applicant who fails to comply with this requirement may be disqualified.

The Contracting Authority is not responsible for and will not pay for any expense or cost incurred or loss suffered by an Applicant in the preparation or submission of its Application or otherwise. Further, the Contracting Authority is not responsible for any travel or accommodation costs incurred by the Applicant unless previously agreed in writing by the Contracting Authority. Each Applicant is fully responsible for the entirety of all expenses and/or costs it incurs in the presentation or submission of an Application or in participating in this process and competition.

5.9 European Single Procurement Document

Under the 2014 Directives, suppliers may have compiled an ESPD which will be accepted as evidence of compliance with Section A of the Questionnaire. However, the Contracting Authority requires evidence via completed submission of Section B



relating to Technical Capacity. Mere confirmation **will not be** sufficient under these headings.

Progression to tender stage will be conditional upon identified Applicants providing evidence of self-declared information to the Contracting Authority. Failure to provide appropriate evidence within the required timeframe specified will result in the Applicant being deemed inadmissible for the next stage of the competition.

5.10 Evaluation of Applications

An “Application” means the submission by an Applicant of a completed Qualification Questionnaire including the associated appendices.

Applications will be evaluated strictly on their merits in accordance with the published selection criteria, minimum rules and weightings specified in the Qualification Questionnaire.

5.11 Clarification of Applications

While not being obliged to seek clarifications from Applicants, the Contracting Authority reserves the right, at its absolute discretion, to ask Applicants for clarification or elaboration of their Applications to assist in its evaluation of Applications.

However, it is emphasised that the Contracting Authority will not be obliged to seek clarification where any of the essential pass requirements set out in the Qualification Questionnaire have not been met. Therefore, Applicants should pay particular attention to ensure that their Applications contain all the required information.

5.12 Identification of Tender List

All applications will be evaluated in line with the criteria and rules outlined in Appendix A. Responses will be scored and the top scoring eight (8) will be invited to tender, subject to that number meeting the minimum requirements.

5.13 Freedom of Information Acts

All responses to this Qualification Questionnaire will be treated in confidence and no information contained therein will be communicated to any third party without the written permission of the Applicant except insofar as is specifically required for the consideration and evaluation of the response or as may be required under law, including the Freedom of Information Act 2014, EU and Irish Government Procurement Procedures, or in response to questions, debates or other parliamentary procedures in or of the Oireachtas (the Irish Parliament).

Applicants are asked to consider if any of the information supplied by them in response to this request for tenders should not be disclosed because of its sensitivity. If this is the case, applicants should specify the information that is sensitive and the reasons for its sensitivity. the Contracting Authority cannot guarantee that any information provided by applicants, either in response to this Qualification



Questionnaire or in the course of any contract awarded as a result thereof, will not be released pursuant to the Contracting Authority's obligations under law, including the Freedom of Information Act 2014, EU and Irish Government Procurement Procedures. the Contracting Authority accepts no liability whatsoever in respect of any information provided which is subsequently released or in respect of any consequential damage suffered as a result of such disclosure.

5.14 Interference

Any effort by the Applicant to unduly influence the Contracting Authority, relevant agency personnel or any other relevant persons or bodies in the process of examination, clarification, evaluation and comparison of Applications and in decisions concerning the award of the contract shall have their Application rejected.

In accordance with Section 38 of the Ethics in Public Office Act 1995 any money, gift or other consideration from a person holding or seeking to obtain a contract will be deemed to have been paid or given corruptly unless the contrary is proved.

5.15 Inducement to Purchase

The Contracting Authority shall be entitled to disqualify an Applicant in one of the following circumstances:

- (a) if the Applicant has offered or given or agreed to give to any person any gift or consideration of any kind as an inducement or reward for doing or forbearing to do, or for having done or forborne to do, any action in relation to the obtaining or execution of this contract award procedure or showing or forbearing to show favour or disfavour to any person in relation to this contract award procedure or any other contract award procedure with the Contracting Authority, or
- (b) if like acts have been done by any other person employed by the Applicant or acting on its behalf (whether with or without the knowledge of the Applicant).



APPENDIX A: QUALIFICATION QUESTIONNAIRE

REF	PASS/FAIL CRITERIA	PASS REQUIREMENT
A1	Applicant Summary	Applicants must complete this section. If the Applicant is a grouping, then a separate questionnaire must be completed for each group member.
A2	Tax Compliance	<p>Note: Applicants are required to complete a Self-Declaration Form (A5). Applicants should note that if invited to tender, they will be required to provide the evidence self-declared prior to receipt of invitation to tender. If the Applicant is a grouping, then each member must complete the Self-Declaration Form (A5).</p>
A3	Turnover	
A4	Insurance	
A6	Manpower and Skills	All members of the Applicant's Team must demonstrate access to at least the minimum numbers of skilled personnel stated. Please note that the skills outlined may reside in the same person. Applicants should complete the table (A6) applicable to their discipline.
A7	Minimum Experience	All members of the Applicant's Team must confirm by way of declaration that they have successfully delivered services of a comparable nature and scale to those required by the LDA on three (3) previous occasions within the previous 5 years. The Contracting Authority reserves the right to contact the reference included to verify the information provided. Please note evidence is only required, at this stage from Architectural Services, Civil and Structural Engineering Services, Mechanical, Electrical & ICT Engineering Services and Planning & Environmental Services, as per Section B.1 to B.4 below.
A8	Conflict of Interest	All members of the Applicant's Team must provide a conflict of interest declaration in A8
A9	Declaration of Bona Fides	Applicants must complete, sign and date this Declaration. Non-compliant Applicants under any of the headings will be automatically disqualified. If the Applicant is a grouping, then a separate Declaration must be completed for each group member.



REF	WEIGHTED CRITERIA	MAX POINTS AVAILAB LE	ASSESSMENT	MIN POINTS REQUIRED
B1	Architectural	4,000	<p>Applicants may refer to up to five (5) instances within the last five (5) years which demonstrate that they have successfully delivered architectural services of a comparable nature and scale to those required by the LDA.</p> <p>Please provide one example of both new build and retrofit experience in the residential sector and experience acting as Design Team Lead.</p> <p>The projects referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.</p>	2,000
B2	Quantity Surveying	2,250	<p>Applicants should refer to three (3) instances within the last five (5) years which demonstrate that they have successfully delivered QS services of a comparable nature and scale to those required by the LDA.</p> <p>Please provide one example of both new build and retrofit experience in the residential sector.</p> <p>The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.</p>	1,125
B3	Civil & Structural	2,250	<p>Applicants should refer to three (3) instances within the last five (5) years which demonstrate that they have successfully delivered civil & structural</p>	1,125



			<p>engineering services of a comparable nature and scale to those required by the LDA.</p> <p>Please provide one example of both new build and retrofit experience in the residential sector.</p> <p>The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.</p>	
B4	Mechanical, Electrical & ICT	2,250	<p>Applicants should refer to three (3) instances within the last five (5) years which demonstrate that they have successfully delivered Mechanical, Electrical & ICT services of a comparable nature and scale to those required by the LDA.</p> <p>Please provide one example of both new and retrofit experience in the residential sector.</p> <p>The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.</p>	1,125
B5	Planning & Environmental	1,500	<p>Applicants should refer to three (3) instances within the last five (5) years which demonstrate that they have successfully delivered Planning & Environmental Services of a comparable nature and scale to those required by the LDA for the specific Lot that the tender wishes to be considered.</p> <p>Please provide one example of new build and retrofit experience in the residential</p>	750



			sector and experience liaising with local and national stakeholders as part of the planning process. The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.	
TOTAL		12,250	N/A	6,125

NOTE 1: Tenderers should note that they must achieve a minimum rating of 50% for each of the individual qualitative criteria (B1) to (B5) in order to avoid elimination from the competition.

Qualitative criteria will be scored using the following baseline scoring system:

Score	Meaning	Interpretation
90 – 100%	Outstanding	A very comprehensive response demonstrating extensive understanding offering full assurance to client – fully supported with no reservations.
80 – 89%	Excellent	An excellent response demonstrating excellent understanding offering assurance to client – strongly supported.
70 – 79%	Very good	A very good response demonstrating very good understanding offering assurance to client – fully supported.
60 – 69%	Good	A good response demonstrating good understanding offering assurance to client – well supported.
50 – 59%	Acceptable	An acceptable response demonstrating a minimum understanding offering assurance to client - satisfactorily supported.
Less than 50% is unacceptable		



SECTION A – PASS/FAIL CRITERIA LOT 1
All members of the Applicant Team must complete this Section

A1. APPLICANT SUMMARY				
Weighting: Pass/Fail only				
Pass requirement: Applicants must complete this section.				
Organisation Name				
Role in this Procurement Process				
Contact Name				
Position				
Address				
Telephone Office				
Telephone Mobile				
Email				
Date of establishment, if applicable				
Preferred Framework Lot	Lot 1		Lot 2	
Legal Status, if any <i>(Company (Ltd.), Partnership, Sole Trader, etc.)</i>				
Please confirm if you are an SME (Small and Medium Enterprise) as defined in Commission Recommendation 2003/361/EC	Yes		No	
Definition as per 2003/361/EC <i>The category of micro, small and medium-sized enterprises (SMEs) is made up of enterprises which employ fewer than 250 persons and which have an annual turnover not exceeding EUR 50 million, and/or an annual balance sheet total not exceeding EUR 43 million.</i>				



A1.1: Lead Applicant

Maximum Points: Pass/Fail Only

Pass requirement: Applicants must complete this section.

Please note that each Applicant Team/Consortium Member (if applicable) must complete Questions A2 – A9 (incl)

In addition, the Architect, Civil & Structural Engineer, Mechanical, Electrical & ICT Engineer and Planning & Environmental Consultant must complete Question B1

NOTE: Applicants must carefully read the requirements outlined in Section 5 of this Document in relation to Consortia.

Is the applicant a group of economic operators?

Yes No

If Yes, please provide the following information:

Please enclose an organisational chart with the proposed hierarchical structure of the grouping

Confirm if attached

Yes No

Please describe the commercial and legal relationship amongst its members

If your answer is "Yes", please provide the following information:	Name	Service to be delivered	Confirm Separate Questionnaire enclosed?
Consortium Member #1			
Consortium Member #2			
Consortium Member #3			



A1.2: All Applicants/Design Team

Maximum Points: Pass/Fail Only

Pass requirement: Each Sub-Contractor must hold the relevant accreditation/registration.

Please note that each Design Team Member (if applicable) must complete Questions A2 – A9 (incl)

In addition, the Architect, Civil & Structural Engineer, Mechanical, Engineer & ICT and Planning & Environmental Consultant must complete Question B1 - B4

The Contracting Authority may carry out checks to ensure that Sub-Contractors have the required accreditation/registrations and/or may require Sub-Contractors to provide evidence of such accreditations/registrations prior to award of the Development Agreement

Sub-Contractor:	Requirement	Service to be delivered	Identify Lead/Sub-Contractor
Architectural Services	Is listed on the Register of Architects of the Royal Institute of Architects of Ireland or a Member of the Royal Institute of British Architects (or equivalent)	Yes/No	
Quantity Surveying	Is listed on the Register of the Society of Chartered Surveyors Ireland or accredited by the Royal Institute of Chartered Surveyors (or equivalent)	Yes/No	
Civil & Structural Engineering	Is a Member on the Register of Engineers Ireland or registered with the Engineering Council UK (or equivalent)	Yes/No	
Mechanical, Electrical & ICT Engineering	Is a Member of the Chartered Institute of Building Services Engineers or registered with the Engineering Council UK (or equivalent)	Yes/No	



Planning & Environmental and/or Sustainability Consultant	Is Registered as a member of the Irish Planning Institute or the Royal Town Planning Institute (or equivalent)	Yes/No	
Landscape Architectural Services	Is a Member of the Irish Landscape Institute or a Chartered Member of the UK Landscape Institute (or equivalent)	Yes/No	
Project Supervisor for the Design and Construction Process	Statutory appointment as set out in Safety, Health and Welfare at Work (Construction) Regulations 2013. Member of NEBOSH, IOSH (or equivalent)	Yes/No	
Traffic Management Services	Is a Member on the Register of Engineers Ireland or registered with the Engineering Council UK (or equivalent)	Yes/No	
Archaeological Services Consultant	Is Registered with the National Monuments Service of Ireland	Yes/No	



A2. TAX CLEARANCE CERTIFICATE DECLARED BY SELF-DECLARATION (All Design Team Members)

Weighting: Pass/Fail only

Pass requirement: Applicants and each member of the Applicants Team must complete the self-declaration (A5) providing information regarding their tax compliance.

A3. FINANCIAL CAPACITY DECLARED BY SELF-DECLARATION (Lead Applicant Only)

Weighting: Pass/Fail only

Pass requirement:

- (a) Lot 1: Confirmation that the lead applicant party turnover exceeded €6m during **each** of the last three years or pro-rata if more recently established firms are tendering – however the firm must have been in existence for at least 6 months.
- (b) Lot 2: Confirmation that the lead applicant party turnover exceeded €3m during **each** of the last three years or pro-rata if more recently established firms are tendering – however the firm must have been in existence for at least 6 months.

In addition

- (c) Confirmation of financial standing ensuring the applicant party has the financial capacity to pay its debts identified on the current statement of assets and liabilities as being the debts as they fall due.

Evidence of both statements will be required prior to confirmation on a tender list.

NOTE #1 ~~In the case of an Applicant being a grouping, this condition may be satisfied by the group members as a whole whereby the Lead Applicant can provide 80% of the required turnover allowing the remaining 20% be fulfilled by the group applicants, or whereby full reliance on the lead Applicant, self-declaration / evidence will only be required of the lead. In the case of an Applicant being a grouping, this condition may be satisfied by the group members as a whole, or by reliance on the lead Applicant. Where group members are relying on the lead Applicant's financial capacity then this should equate to 80% of the overall turnover allowing the remain 20% be fulfilled by the remaining applicants, self-declaration / evidence will only be required of the lead~~

NOTE #2: In the case of firms more recently established evidence of pro-rata turnover will suffice.

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A4. INSURANCES DECLARED BY SELF-DECLARATION (All Design Team Members)

Weighting: Pass/Fail only

Pass requirement: Applicants should complete the self-declaration (A5) providing information regarding the insurances in place and are asked to note that the following levels will be required for the firm(s) being awarded this contract. Evidence of the following insurance levels should be provided as an appendix.

NOTE #1: In the case of an Applicant being a grouping, this condition may be satisfied by the group members as a whole, or by reliance on the lead Applicant. Where group members are relying on the lead Applicant's financial capacity, self-declaration / evidence will only be required of the lead.

Insurance Type	Required Level
Public Liability	€6.5m
Employers Liability	€13m
Professional Indemnity (Lot 1) (on any one claim) This limit is not an annual aggregation	€10m (will be advised on a case by case basis)
Professional Indemnity (Lot 2) (on any one claim) This limit is not an annual aggregation	€6.5m (will be advised on a case by case basis)



A5. SELF DECLARATION OF FINANCIAL INFORMATION			
TAX CLEARANCE (All Design Team Members)			
(A) I confirm and declare having a current and valid Tax Clearance Certificate in place and our tax affairs are in order. The Contracting Authority can verify your tax clearance status through Revenue's online facility at www.ros.ie . To this end, please confirm:			
Do you grant the Contracting Authority permission to verify your tax status online via www.ros.ie ?	Yes		No
Information required using new tax clearance certificate status being adopted in 2018			
Applicant Name			
Applicant PPSN/Tax Reference Number			
Access Number			
OR I confirm that I currently hold a valid paper tax clearance certificate	Registration Number		
	Certificate Number		
OR I confirm that I have applied for a Tax Clearance Certificate details of which will be made available as soon as available.			Yes
FINANCIAL STANDING (Lead Applicant only)			
I confirm that our turnover exceeded:			
Lot 1: €6m per annum in each of the last three financial years.			
Lot 2: €3m per annum in each of the last three financial years.			
Note: if turnover figures for 2019 are unavailable, please use 2018, 2017 and 2016.			
Financial Year	2019	2018	2017
Turnover	€	€	€
I confirm that I will provide the following promptly on request at any time prior to the tender list being finalised: <ul style="list-style-type: none"> evidence of turnover for the past three financial years 	Yes		
	No		
INSURANCES (All Design Team members)			



(B) I confirm that we have the following insurances in place:				
Insurance Type	Level in Place	Details of Any Excess	Expiry Date	
Employers Liability	€			
Public Liability	€			
Professional Indemnity	€			
AND				
I confirm that if successful, where the levels required under the framework are higher than those currently in our possession, I will be in a position to put the required forms and levels of insurances required in place promptly.		Yes		No
AND				
I confirm that I will provide the following promptly on request at any time prior to the award decision being made:		Yes		No
<ul style="list-style-type: none"> evidence of insurances in place or letter from Insurance Broker confirming that the required levels could be put in place if successful 				
Please note that the Contracting Authority will seek to verify self-declarations regarding financial capacity prior to next stage of the competition.				
Signed:				
Position:				
Dated:				



A6 MANPOWER AND SKILLS (Architectural)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Principal Architect - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience on projects similar in nature, scale and complexity			1
Senior Architect - a relevant degree or equivalent professional qualification, and - a minimum of 10 years post qualification experience working on projects similar in nature scale and complexity			3
Architect - a relevant degree or equivalent professional qualification, and - a minimum of 7 years post qualification experience			3
Assistant Architect - a relevant degree or equivalent professional qualification, and - a minimum of 5 years post qualification experience			1
Total number of suitably qualified resources.			8



Please attach an organisation chart, clearly identifying all design team disciplines.

Organisation Chart Attached	Yes		No	
Page No. / Appendix No. in our submission				

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Quantity Surveyor)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Director Quantity Surveyor with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Senior Quantity Surveyor with: - a relevant degree or equivalent professional qualification, and - a minimum of 10 years post qualification experience working on projects similar in nature scale and complexity			2
Junior Quantity Surveyor with: - a relevant degree or equivalent professional qualification, and - a minimum of 7 years post qualification experience			3
Total number of suitably qualified resources.			6



NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Civil & Structural)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Principal Civil & Structural Engineer with - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience on projects similar in nature, scale and complexity			1
Senior Civil & Structural Engineer with: - a relevant degree or equivalent professional qualification, and - a minimum of 10 years post qualification experience working on projects similar in nature scale and complexity			2
Civil & Structural Engineer with: - a relevant degree or equivalent professional qualification, and - a minimum of 7 years post qualification experience			2
Assistant Civil & Structural Engineer with: - a relevant degree or equivalent professional qualification, and			1



- a minimum of 5 years post qualification experience			
Total number of suitably qualified resources.			6

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Mechanical, Electrical & ICT)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Principal Mechanical, Electrical & ICT Engineer with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience on projects similar in nature, scale and complexity			1
Senior Mechanical, Electrical & ICT Engineer each with: - a relevant degree or equivalent professional qualification, and - a minimum of 10 years post qualification experience working on projects similar in nature scale and complexity			2
Mechanical, Electrical & ICT Engineer with: - a relevant degree or equivalent professional qualification, and - a minimum of 7 years post qualification experience			2
Assistant Mechanical, Electrical & ICT Engineer with: - a relevant degree or equivalent professional qualification, and			1



- a minimum of 5 years post qualification experience			
Total number of suitably qualified resources.			6

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Planning & Environment)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Senior Planning Consultant with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Senior Environmental and/or Sustainability Consultant with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Total number of suitably qualified resources.			2

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Landscape Architect)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Senior Landscape Architect with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Associate Landscape Architect with: - a relevant degree or equivalent professional qualification, and - a minimum of 7 years post qualification experience			1
Total number of suitably qualified resources.			2

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (PSDP)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Senior Project Supervisor Design Process (PSDP) with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Total number of suitably qualified resources.			1

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Traffic Management)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3rd Parties	Minimum Number Required
Senior Traffic Management Consultant with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Total number of suitably qualified resources.			1

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Archaeology)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Senior Archaeologist with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Total number of suitably qualified resources.			1

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A7 Previous experience – Declaration (to be completed by all members of the Design Team/Applicants)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: All members of the Applicants Design Team must confirm that they have successfully delivered services of a comparable nature and scale to those required by the LDA for the tenderers preferred lot for three (3) projects within the previous 5 years.

Contract Name	Contact Person	Outline of Services Provided & Current status of Project



A8 CONFLICT OF INTEREST DECLARATION

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: The Applicant and each member of the Applicant Team must sign and date this Declaration.

Note

I/We can confirm that there is no level of conflict, or perceived conflict of interest, in relation to the personnel or work involved in the Contract:	Yes	
	No	
If No: please explain what the possible conflict or perceived conflict of interest may be and who it relates to and how it could affect the Contract		
Organisation Name		
Role in this Procurement Process		
Contact Name		
Position		



A9 DECLARATION OF BONA FIDES

In relation to an award procedure under Public Sector Directive 2014/24/EU (Article 57).

Weighting: Pass/Fail only

Pass requirement: Applicants must complete, sign and date this Declaration. the Contracting Authority reserves the right at its discretion to exclude a non-compliant Applicant under each heading. This must be completed by each group member.

Economic Operators will be excluded from the procurement process if, within the past five (5) years, there is evidence of a conviction relating to a specific criminal offence listed below (see 1.1) or if they have been the subject of a binding legal decision which found a breach of legal obligations to pay tax or social security contributions (see 1.2) (except where this is disproportionate e.g. where only minor amounts are involved).

		YES	NO
		Please indicate your answer by marking 'X' in the relevant box	
1.1 Has the Economic Operator or a member of their proposed consortium, (if applicable), Director, or Partner or any other person who has powers of representation, decision or control, been convicted of any of the following offences?			
1.1.a	participation in a criminal organisation, as defined in Article 2 of Council Framework decision 2008/841/JHA;		
1.1.b	corruption, as defined in Article 3 of the Convention on the fight against corruption involving officials of the European Communities or officials of Member States of the European Union and Article 2(1) of Council Framework Decision 2003/568/JHA as well as corruption as defined in Irish Law or the jurisdiction in which the Economic Operator is established;		
1.1.c	fraud within the meaning of Article 1 of the Convention on the protection of the European Communities' financial interests;		
1.1.d	the subject of a conviction for terrorist offences or offences linked to terrorist activities or for inciting or aiding or abetting or attempting to commit an offence;		
1.1.e	the subject of a conviction for money laundering or terrorist financing;		



1.1.f	the subject of a conviction of child labour and other forms of trafficking in human beings;		
Non-payment of taxes or social security obligations 1.2 Has it been established by a judicial or administrative decision having final and binding effect in accordance with Irish law or the legal provisions of the country in which the Economic Operator is established (if outside Ireland), that the Economic Operator is in breach of obligations related to the payment of tax and social security contributions? Note: If the response to 1.2 above is in the affirmative, please provide further information on the decision and the amounts involved			

An Economic Operator who answers 'Yes' in any of the situations set out in paragraphs 2.1.a to 2.1.i will be excluded.

2.1 Please indicate if any of the following situations have applied, within the past three (3) years, or currently apply, to your organisation. The Economic Operator:		YES	NO
		Please indicate your answer by marking 'X' in the relevant box	
2.1.a	has, in the performance of any public contract, failed to comply with applicable obligations in the field of environmental, social and labour law applying at the place where the works were carried out or the services provided, as established by EU law, national law, collective agreements or by international, environmental, social and labour law listed in Annex X of Directive 2014/24/EU;		
2.1.b	is bankrupt or the subject of insolvency or winding-up proceedings, its assets are being administered by a liquidator or by the court, or has entered into an arrangement with creditors, suspended its business activities or is in any analogous situation arising from a similar procedure under national laws and regulations;		
2.1.c	is guilty of grave professional misconduct which renders its integrity questionable;		



2.1.d	has entered into agreements with other economic operators aimed at distorting competition;		
2.1.e	has a conflict of interest within the meaning of Article 24 of 2014/24/EU that cannot be effectively remedied by other, less intrusive, measures;		
2.1.f	confirms that it has had prior involvement in the preparation of the procurement procedure which has resulted in a distortion of competition, as referred to in Article 41 of 2014/24/EU, that cannot be remedied by other, less intrusive, measures;		
2.1.g	has shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions.		
2.1.h	<ul style="list-style-type: none"> • is guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria; or 		
	<ul style="list-style-type: none"> • has withheld such information or is not able to submit supporting documents required under Article 59 of Directive 2014/24/EU; or 		
2.1.i	<p>has undertaken to:</p> <ul style="list-style-type: none"> • unduly influence the decision-making process of the contracting entity, or • obtain confidential information that may confer upon the Tenderer undue advantages in the procurement procedure; or • negligently provide misleading information that may have a material influence on decisions concerning exclusion, selection or award. 		



DECLARATION RE STATUTORY OBLIGATIONS			
We confirm that we are fully compliant with the following legislation, or equivalent legislation in our country of establishment / operation:		YES	NO
(i)	Employment Equality Acts 1998-2011		
(ii)	Equal Status Acts 2000-2011		
(iii)	National Minimum Wage Act 2000 as amended		
(iv)	Organisation of Working Time Act 1997 as amended		
(v)	Safety, Health and Welfare at Work Act 2005 and Safety, Health and Welfare at Work (General Application) Regulations 2007		
(vi)	Disability Act 2005		
(vii)	We have procedures in place to ensure that our subcontractors, if any are used for this contract, apply the same standards.		
<p>This Declaration is made for the benefit of the Contracting Authority</p> <p>I certify that the information provided in this declaration is accurate and complete to the best of my knowledge and belief. I understand that the provision of inaccurate or misleading information in this Declaration will lead to my organisation being excluded from participation in this and future tenders and I am signing on behalf of:</p>			
Name of Economic Operator			
Authorised Signatory			
Name in print or block capitals			
Rank / Position			
Role in Procurement Process			
<p>NOTE:</p> <p>The term Economic Operator covers equally the concepts of Contractor, Supplier and Service Provider whether as Applicant, Tenderer or Participant under an award procedure in accordance with the relevant Public Procurement Directive.</p>			



SECTION B - WEIGHTED CRITERIA LOT 1

B1 PREVIOUS CONTRACTS – Architect only.

Applicants may refer to up to five (5) instances within the last **five years** which demonstrate that they have successfully delivered services of a comparable nature and scale to those required by the LDA, for the preferred lot which the tenderer wishes to be considered.

Please provide one example of both new build and retrofit experience in the residential sector and experience acting as Design Team Lead.

The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.

Information shall be submitted using the project sheets below in legible font and shall be limited to 2 pages per project.

The contracts listed should be chosen to demonstrate your firm's skills, efficiency, experience and reliability in the relevant areas of expertise.

All fields should be completed in full. In the event that the information requested on the value of contracts or identity of clients is considered confidential, Applicants must ensure that they provide sufficient information to allow the contracting entity to judge the similarity of these contracts to the services required.

Architectural Services			
CONTRACT #1			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	

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Details of Services provided	
Frequency of supply/service	
Approx. Project Capital Value €	
Approx. Annual Appointment Value €	
Please indicate below the extent of which this project is comparable with this framework	



Architectural Services CONTRACT #2			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this framework			



Architectural Services CONTRACT #3			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this framework			



Architectural Services CONTRACT #4			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this framework			



Architectural Services CONTRACT #5			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this framework			



B2 PREVIOUS CONTRACTS – Quantity Surveyor Services only.

Applicants (should refer to three (3) instances within the last three years which demonstrate that they have successfully delivered services of a comparable nature and scale to those required by the LDA.

Please provide one example of both new build and retrofit experience in the residential sector.

The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.

Information shall be submitted using the project sheets below in legible font and shall be limited to 2 pages per project.

The contracts listed should be chosen to demonstrate your firm's skills, efficiency, experience and reliability in the relevant areas of expertise.

All fields should be completed in full. In the event that the information requested on the value of contracts or identity of clients is considered confidential, Applicants must ensure that they provide sufficient information to allow the contracting entity to judge the similarity of these contracts to the services required.

Quantity Surveying Services CONTRACT #1			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			



Frequency of supply/service	
Approx. Project Capital Value €	
Approx. Annual Appointment Value €	
Please indicate below the extent of which this project is comparable with this contract	



Quantity Surveying Services CONTRACT #2			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this contract			



Quantity Surveying Services CONTRACT #3			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this contract			



B3 PREVIOUS CONTRACTS – Civil and Structural Engineering Services Only.

Applicants (should refer to three (3) instances within the last **five years** which demonstrate that they have successfully delivered services of a comparable nature and scale to those required by the LDA.

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Please provide one example of both new build and retrofit experience in the residential sector.

The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.

Information shall be submitted using the project sheets below in legible font and shall be limited to 2 pages per project.

The contracts listed should be chosen to demonstrate your firm's skills, efficiency, experience and reliability in the relevant areas of expertise.

All fields should be completed in full. In the event that the information requested on the value of contracts or identity of clients is considered confidential, Applicants must ensure that they provide sufficient information to allow the contracting entity to judge the similarity of these contracts to the services required.

Civil & Structural Engineering Services CONTRACT #1			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			



Frequency of supply/service	
Approx. Project Capital Value €	
Approx. Annual Appointment Value €	
Please indicate below the extent of which this project is comparable with this contract	



Civil & Structural Engineering Services CONTRACT #2			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this contract			



Civil & Structural Engineering Services CONTRACT #3				
Start Date - End Date				
Client Name & address				
Client contact person:	<table border="1"><tr><td></td><td>Phone no.:</td><td></td></tr></table>		Phone no.:	
	Phone no.:			
Details of Services provided				
Frequency of supply/service				
Approx. Project Capital Value €				
Approx. Annual Appointment Value €				
Please indicate below the extent of which this project is comparable with this contract				



B4 PREVIOUS CONTRACTS – Mechanical, Electrical & ICT Engineer only.

Applicants (should refer to three (3) instances within the last **five years** which demonstrate that they have successfully delivered services of a comparable nature and scale to those required by the LDA.

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Please provide one example of both new build and retrofit experience in the residential sector.

The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.

Information shall be submitted using the project sheets below in legible font and shall be limited to 2 pages per project.

The contracts listed should be chosen to demonstrate your firm's skills, efficiency, experience and reliability in the relevant areas of expertise.

All fields should be completed in full. In the event that the information requested on the value of contracts or identity of clients is considered confidential, Applicants must ensure that they provide sufficient information to allow the contracting entity to judge the similarity of these contracts to the services required.

Mechanical, Electrical & ICT Engineering Services CONTRACT #1			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	



Details of Services provided	
Frequency of supply/service	
Approx. Project Capital Value €	
Approx. Annual Appointment Value €	
Please indicate below the extent of which this project is comparable with this contract	



Mechanical & Electrical Engineering Services CONTRACT #2			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this contract			



Mechanical, Electrical & ICT Engineering Services CONTRACT #3			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this contract			



B5 PREVIOUS CONTRACTS – Planning & Environmental Consultant only.

Applicants (should refer to three (3) instances within the last **five years** which demonstrate that they have successfully delivered services of a comparable nature and scale to those required by the LDA.

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Please provide one example of new build and retrofit experience in the residential sector and experience liaising with local and national stakeholders as part of the planning process.

The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.

Information shall be submitted using the project sheets below in legible font and shall be limited to 2 pages per project.

The contracts listed should be chosen to demonstrate your firm's skills, efficiency, experience and reliability in the relevant areas of expertise.

All fields should be completed in full. In the event that the information requested on the value of contracts or identity of clients is considered confidential, Applicants must ensure that they provide sufficient information to allow the contracting entity to judge the similarity of these contracts to the services required.

Planning & Environmental Services CONTRACT #1			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	



Details of Services provided	
Frequency of supply/service	
Approx. Project Capital Value €	
Approx. Annual Appointment Value €	
Please indicate below the extent of which this project is comparable with this contract	



Planning & Environmental Services CONTRACT #2				
Start Date - End Date				
Client Name & address				
Client contact person:	<table border="1"><tr><td></td><td>Phone no.:</td><td></td></tr></table>		Phone no.:	
	Phone no.:			
Details of Services provided				
Frequency of supply/service				
Approx. Project Capital Value €				
Approx. Annual Appointment Value €				
Please indicate below the extent of which this project is comparable with this contract				



Planning & Environmental Services CONTRACT #3			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this contract			



Outline Brief
for the
Purposes of Architect Led Design
Team Procurement

Cherry Orchard, Dublin 10

CONTENTS

1	Introduction	3
2	Background and Site Details	3
3	Outline Sustainable Urban Design Brief	5
4	Project Brief Requirements	6
5	Tendered Fees	8
6	Procurement Considerations for the Design Team	8
7	Programme	10
8	Cherry Orchard – Site Layout & Phasing Drawing	11

1 Introduction

The purpose of this outline brief is to provide supporting information to facilitate the establishment of a multi-party framework agreement for Architectural Led Design Team services and award of the Initial Contract, the delivery of a new neighbourhood development on lands located in Cherry Orchard, Dublin 10 (the "Site").

This outline brief is to be read in conjunction with the *Framework Scope of Services* document and all other tender documentation enclosed with the Invitation to Tender.

2 Background and Site Details

The subject Site is c. 12.86 hectares and is located within the *Park West – Cherry Orchard Local Area Plan 2019* lands and comprises of site 4 (M50/ Cedarbrook Avenue) and site 5 (Bernville) as identified in the LAP. Refer to *Figure 1 & Figure 2* below.

Park West – Cherry Orchard is identified in the Dublin City Development Plan 2016 – 2022 as a key strategic development and regeneration area capable of delivering a significant quantum of new homes and employment opportunities for the area. The LAP for the area was adopted in 2019 and is available, together with associated documents, at the following link:

<https://www.dublincity.ie/residential/planning/strategic-planning/local-area-plans/local-area-plan-park-west-cherry-orchard-area>

LAP Vision: Park West - Cherry Orchard will be an attractive and identifiable place with a vibrant and active community. A good mix of residential typologies will cater for people across all spectrums of their lifecycle, and residents will have the benefit from the provision of local shops, schools, parks and community and recreational facilities. New commercial and enterprise space will provide opportunities for local employment and both residents and workers will benefit from a high quality integrated public transport network system, and a permeable and safe environment.

Key to the implementation of the overall "Vision" for the LAP area will be the development of the subject Site, sites 4 & 5, and their successful and sustainable integration into the existing urban fabric of both the immediate area and the wider city.

The development strategy of the LAP is in accordance with the land use strategy and zoning objectives set out in the Dublin City Development Plan 2016 – 2022, in addition to the Development Plan's strategic development and regeneration guiding principles, summarised as follows:

- Create a vibrant and sustainable new urban area
- Create a distinctive urban character
- Provide sufficient densities of development to sustain public transport and mix of uses
- Integrate public transport
- Integrate new and established communities
- Provide a mix of residential tenure
- Develop a coherent spatial framework with a physical structure which links the rail station with Ballyfermot Road and Park West Road, provides a main street with a mix of uses including a supermarket and provides a new civic space adjacent to the main street and linked to the existing civic space adjacent to the rail station
- Provide mid-rise landmark buildings
- Create a new town that addresses the key historic and existing deficits with regard to layout, community under-development, policing, anti-social activity, lack of provision for childcare etc.

The LAP includes high level site briefs;

- site 4 M50/ Cedarbrook Avenue (Pg.70)
- site 5 Bernville (Pg. 71)

It should be noted that while the LAP establishes the development parameters on a statutory basis it does not propose specific solutions.

Figure 1 - Park West – Cherry Orchard Local Area Plan lands

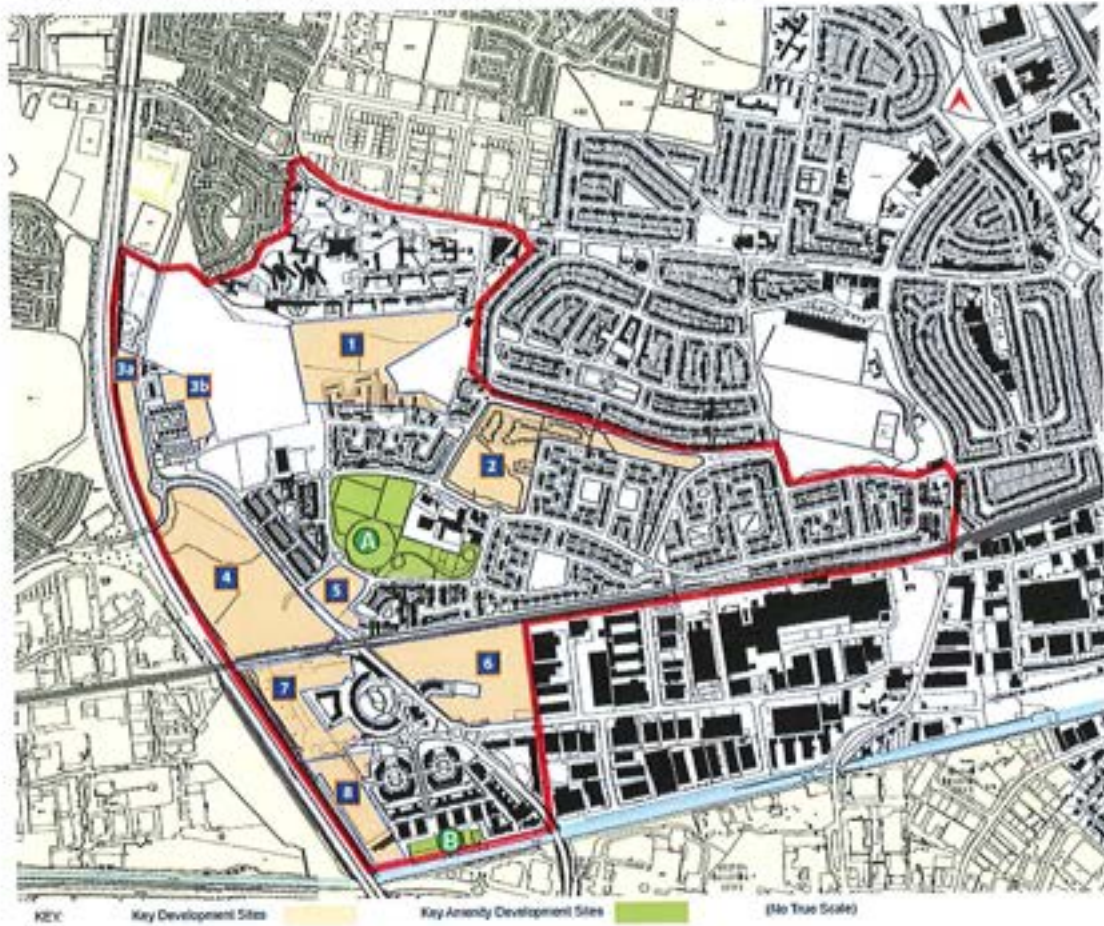


Figure 2 – The Site (c. 12.86 hectares, comprising site 4 & 5)



Site 4 = 11.28 hectares
(voted as 11.55 hectares in LAP)



Site 5 = 1.58 hectares

3 Outline Sustainable Urban Design Brief

ALDT's will be asked to demonstrate how they propose to respond to the urban design challenges and opportunities for the subject site with specific reference to the potential for embedding sustainability as a core driver of the design process. Detailed brief development will include specific reference to the following themes and will reference relevant design guidance (statutory & industry best practice standards) and its application, particularly during the early stages of design development and optimisation. ALDT's will need to consider how access, circulation, massing, distribution, orientation and other areas noted below can be optimised in the context of a sustainable design strategy while working within the boundaries of the adopted LAP.

Transport, Access & Circulation Hierarchy

ALDT's will be asked to consider access to and circulation within the site to the different functional areas (commercial, mixed use & residential) and consider the hierarchy of road surfaces / shared surfaces to give priority for circulation within the site to the pedestrian and cyclist. ALDT's will be asked to consider reduced parking provision, electric car charge points and facilitation of car sharing schemes.

Density, Massing & Distribution

With reference to the principles established in the LAP, ALDT's will be asked to provide an indicative range of development density proposals for the site expressed as both units per hectare & population density per Hectare. Design teams will be required in the early stages of brief development to demonstrate through graphic materials, text and other materials as appropriate how massing and distribution of building elements will be informed by their analysis of the site-specific challenges and opportunities arising. ALDT's will be required to reference relevant design standards for site planning for daylight & sunlight and indicate how the use of these tools will be integrated into their design process from the earliest stages.

Biodiversity & Amenity

ALDT's will be asked to give an overview of baseline surveys required and how these will inform their understanding of the wider context and opportunities for biodiversity & ecological enhancement. ALDT's should ensure that effective communication & coordination between the ecologist, landscape architect and civil engineer is embedded in the design process in order to analyse and develop proposals for the potential for use of green infrastructure to address surface water run off & attenuation and enhance amenity & biodiversity value on site. ALDT's will be asked to prioritise the use of native species in planting schemes including establishment and/ or enhancement of native hedgerows at appropriate densities and mixes to form a green spine through the interlinking of public, semi public & private amenity spaces. It is expected that this approach will manifest in a coherent hierarchy of green public amenity space linking the northern end of site to transport/ community/ retail hub at Cherrywood train station to the south. Coordination of the inclusion of nesting & roosting potential e.g. swift boxes, bat boxes etc into boundary wall treatments, building facades and planted areas will be the responsibility of the landscape architect working with the Ecologist who should advise the design team. ALDT's should reference the LAP regarding the use of boundary planting as a visual & acoustic buffer to the M50 along the western boundary.

Building Form, Orientation, Construction Methods & Outline Design Performance Objectives

ALDT's will be asked to ensure that design for daylighting is incorporated at the appropriate stage of project development. The failure to adopt an appropriate daylight & sunlight strategy and design process will not only affect the qualitative outcome of LDA developments, but may also present a planning risk. Design Teams will also be asked to give consideration to the relationship between built form, reduced energy demand and optimised glazing design required to achieve affordable, healthy and comfortable environments for tenants. This should include an indication of the potential for an energy demand reduction approach to building design with reference to best practice internationally recognised design / certification standards in excess of NZEB requirements. Tenderers may suggest a number of different standards which they deem to be appropriate to the building typology and should include details of the personnel, experience & skillset, within the proposed Design Team to embed the integration of the design performance objectives into the design development process. It will be a requirement to demonstrate an understanding of how water demand reduction strategies can be

incorporated into design proposals. ALDT's will also be asked to explore & report on the potential for the application of MMC solutions at various scales across the site.

Site Energy / Services Master-planning

ADLT's will be asked to consider the development and integration of a site energy strategy into the site masterplan, building design & landscape design. The development of the detailed brief will include exploring the potential for centralised plant & district heating systems within the proposed masterplan area or parts thereof and the impacts and opportunities presented by such an approach relative to the varying scales and development typologies/ uses across the site.

4 Project Brief Requirements

(1) Fixed Lump Sum Fee

This section outlines the elements of the project which shall be priced by the Architect Led Design Team as a fixed lump sum fee.

The below descriptive scope is for pricing guidance only. The more detailed anticipated service scope relevant to each project stage is set out within the *Framework Scope of Services* document.

(1.1) Initial Planning Application (area highlighted red on the *Cherry Orchard – Site Layout & Phasing Drawing* – refer *Section 8*), to include masterplan for overall site 4 & 5 lands (c. 12.86 hectares), key enabling infrastructure and an EIAR. **Stage 1.**

Fixed Lump Sum Fee to reflect:-

- Masterplan, preliminary design, feasibility and development of scheme design & associated information to submission of a valid planning application to the Local Authority - Project Stages 1a and 1b in accordance with the *Framework Scope of Services*, to include:
 - Collation and review of current information relating to the site, including the LAP;
 - Undertaking of feasibility studies, masterplan and reporting with recommendations for the development;
 - Participation / engagement with stakeholders to include the Contracting Authority, the Local Authority, Councillors, the Local Community and other interested stakeholders;
 - Design development and lodgement of a valid Planning Application to the Local Authority for the area highlighted red on *Cherry Orchard – Site Layout & Phasing* drawing, to include a masterplan for overall site 4 & 5 lands (c. 12.86 hectares), key enabling infrastructure, an EIAR for overall site 4 & 5 lands, and including all associated stakeholder engagements;
 - Responding to queries during the Planning process;
 - Tenderer should include for responding to a Further Information request from the Local Authority post lodgement of the planning application.

In the event that additional services are required as a result of the Local Authority planning decision being appealed to An Bord Pleanála, the extent of these services may be agreed with the LDA on a time basis at the tenderers submitted hourly rates.

(1.2) Post Grant of Planning through to Construction & Handover of a portion of the Initial Planning Application (adjacent Park West and Cherry Orchard railway station) including all key enabling infrastructure. **Stages 2-5.** Described as following;

- Project implementation of a higher density (5-10 storey and Landmark Building and lower floors non-residential) residential development scheme (No. of Units to be determined) on a traditional contract basis (i.e. Employer designed, with the Architect acting as Employers Representative) – detailed design and statutory approvals, tender action, evaluation and award, construction, handover & defects period – in line with the Planning Permissions granted and project Stages 2-5 of the Scope of Services.

- Assume a Construction Cost of circa €60m with indicative programme duration of circa 36 months (excl. Defects period).

Fixed Lump Sum Fee to reflect:-

- Detail design development;
- Statutory Approvals (e.g. DAC / FSC) including associated stakeholder engagement & taking into consideration and inclusion of future provisions,
- Procurement strategy/planning and implementation;
- Employers Representative & Team Monitoring roles during project implementation,
- Inspections & certifications in accordance with BCAR,
- Handover and Defects period.

(2) Tendered Percentage Fees

This section outlines the elements of the project which shall be priced by the Architect Led Design Team as percentage fees.

The below descriptive scope is for pricing guidance only. The more detailed anticipated service scope relevant to each project stage is set out within the Framework Scope of Services document.

(2.1) Project implementation of a lower density (0-4 storey) residential development scheme (No. of Units to be determined) on a traditional contract basis (i.e. Employer designed, with the Architect acting as Employers Representative) – feasibility and planning, detailed design and statutory approvals, tender action, evaluation and award, construction, handover & defects period – **Project Stages 1-5 of the Scope of Services.**

Assume a Construction Cost of circa €35m with indicative programme duration of circa 6 months Stage 1 and circa 30 months Stage 2 - 5 (excl. Defects period)"

(2.2) Project implementation of a higher density (5-8 storey, with element of 9-10 storey and ground floor non-residential) residential development scheme (No. of Units to be determined) on a traditional contract basis (i.e. Employer designed, with the Architect acting as Employers Representative) – feasibility and planning, detailed design and statutory approvals, tender action, evaluation and award, construction, handover & defects period – **Project Stages 1-5 of the Scope of Services.**

Assume a Construction Cost of circa €60m with indicative programme duration of circa 9 months Stage 1 and circa 36 months Stage 2 - 5 (excl. Defects period)

Tendered Percentage Fees to reflect:-

- Preliminary design, feasibility and development of scheme design & associated information to submission of a valid planning application to the Local Authority, detailed design and statutory approvals, tender action, evaluation and award, construction, handover & defects period - Project Stages 1-5 in accordance with the *Framework Scope of Services*, to include:
 - Collation and review of current information relating to the site, including the LAP;
 - Undertaking of feasibility studies and reporting with recommendations for the development;
 - Participation / engagement with stakeholders to include the Contracting Authority, the Local Authority, Councillors, the Local Community and other interested stakeholders;
 - Design development and lodgement of a valid Planning Application to the Local Authority and including all associated stakeholder engagements;
 - Responding to queries during the Planning process;
 - Tenderer should include for responding to a Further Information request from the Local Authority post lodgement of the planning application.
 - Detail design development;
 - Statutory Approvals (e.g. DAC / FSC) including associated stakeholder engagement & taking into consideration and inclusion of future provisions,

- o Procurement strategy/planning and implementation;
- o Employers Representative & Team Monitoring roles during project implementation,
- o Inspections & certifications in accordance with BCAR,
- o Handover and Defects period.

In the event that additional services are required as a result of the Local Authority planning decision being appealed to An Bord Pleanála, the extent of these services may be agreed with the LDA on a time basis at the tenderers submitted hourly rates.

Note: The Contracting Authority reserves the right not to proceed with any or all of the above listed items under (1) and (2) and also reserves the right to terminate the contract at any point throughout the project.

5 Tendered Fees

Where fees are tendered as a percentage calculation, and provision of these services is to proceed, it will be the intention to convert the percentage to a lump sum fixed fee at an agreed appropriate stage but no later than the Contracting Authority's sign off on the detailed cost plan for the project or phase thereof. The basis for a fee percentage shall be the agreed estimated Construction Cost (Ex. VAT) for the project. Note the construction costs noted in *Section 4 under (2) Tendered Percentage Fees* are for the purpose of establishing percentage fees. The actual construction costs for the overall project could potentially be €275-€325m plus and be delivered on a multi-phased basis. Note these construction costs are notional and provide no guarantee of work to be awarded under this framework agreement.

For Stage 1 Fees it is anticipated that payment of fees will be;

- Stage 1a 35% of Stage 1 Fee, paid on a monthly basis across the duration of the stage 1a programme, on valid delivery of services
- Stage 1b 65% of Stage 1 Fee, with 60% paid on a monthly basis across the duration of the stage 1b programme, on valid delivery of services, and the remaining 40% paid on lodgement of a valid planning application

For Stage 2 -5 a payment schedule will be agreed with the successful tender in advance of stages commencing.

Note for the Cherry Orchard project the role of Assigned Certifier is not part of the Architect Led Design Team and will be separately procured by the Contracting Authority.

6 Procurement Considerations for the Design Team

6.1 *The design team will need to include as part of their services and include in their tendered fees the costs of the following specialised services as necessary.*

The following sample list is non exhaustive:

- Appropriate Assessment screening report (full AA excluded / NIS excluded, unless already known they are required)
- Environmental Impact Assessment screening report (Please refer to Note 1 below)
- Ecological Impact Assessment with associated initial biodiversity surveys
- Initial biodiversity surveys including bat study, invasive species report, winter bird and summer bird survey as applicable
- Construction and Environmental Management Plan
- Construction and Operational Waste Management Plan
- Landscaping Visual Impacts Assessment & Graphics (incl. verified views and CGIS)

- Photomontages
- Sunlight & Daylight Modelling - Impact Studies & Report
- Road Safety Audit
- Building Conservation Report / Built Heritage Report
- Archaeology Report
- Digital Ordinance Survey-licensed tiles
- Declarations of identity for boundary confirmation
- Creche report
- Schools capacity report (if an additional report is required)
- Wind Modelling & Report
- Air quality monitoring and modelling

6.2 The design team will need to include as part of their services, and include in their tendered fees, for the procurement, appointment, co-ordination and management of the following specialist services, as necessary.

The Contracting Authority will reimburse the cost of these specialist services as appropriate (A Provisional Sum of €150,000 for reimbursing the cost of these specialist services is to be included in the ALDT's tender and is pre-populated in the Pricing and Resource Breakdown excel document). The following sample list is non exhaustive:

- Ground / Geotechnical Investigations (including Soil Infiltration Tests)
- Archaeological Test Trenching & Monitoring
- Topographical Survey
- Measured Buildings Survey (if required)
- Utilities Survey (including GPR survey)
- CCTV Survey (if required)
- Pressure Testing Watermains (if required)
- Traffic Survey
- Asbestos Survey (if required)
- Contaminated Land & Remediation Specialist
- Noise and vibration monitoring and modelling
- Tree Survey & Report

Note 1

With respect to the EIAR we confirm that for the purposes of the design team lump sum fee to planning – tenderers should include for the cost of coordinating and managing completion of the EIAR, the procurement of any specialist surveys required, and the design team resources required to complete the chapters of the EIAR; but that the cost of surveys required for the preparation of the EIAR shall be established following appointment and borne by the Contracting Authority.

6.3 The design team will need to include as part of their services, and include in their tendered fees, for the procurement, appointment, co-ordination and management of a consultation & communication support services provider to provide the following services, as necessary.

The Contracting Authority will reimburse the cost of the consultation & communication support services provider services as appropriate (A Provisional Sum of €50,000 for reimbursing the cost of these specialist services is to be included in the ALDT's tender and is pre-populated in the Pricing and Resource Breakdown excel document).

Phase A	Initial Communication	<p>Initial communications to set out the context of the proposed Cherry Orchard development, introduce the LDA and the Design Team, provide the history of the development of the overall area and a provide links and detail of the LAP already developed. Key activities at this Phase are:</p> <ul style="list-style-type: none"> • Setup website including branding and content • Prepare initial survey, collate and analyse responses • Develop flyer and posters, printing and distribution • Proactive social media • Setup and monitoring of dedicated email address
Phase B	Proposal Engagement	<p>This phase is intended to add a layer of detail to the initial information presented in Phase A and provide an opportunity for stakeholders to engage with the more detailed proposals for the proposed development. Key activities proposed in this Phase are:</p> <ul style="list-style-type: none"> • Update the website with design concepts for the proposed development from the design team and a more detailed survey • Create virtual event room • Proactive, targeted outreach to key stakeholders • Develop and present narrative around initial survey responses • Update stakeholder consultation timeline • Develop further survey with Design Team and incorporate into website, collect feedback • Key stakeholder briefings • Continued social media posting • Continue monitoring of dedicated email address • Public event / online event • Set up physical drop off point for surveys to be returned in a letterbox, collection of same (to be agreed with DCC)
Phase C	Proposal Update Engagement	<p>This phase is to provide updated design proposals for the development prior to completion of planning process to inform the public and stakeholders. Key activities in this Phase will be:</p> <ul style="list-style-type: none"> • Update website and virtual rooms • Host virtual event (or public event if restriction allow for it) • Develop survey feedback narrative and co-ordinate with updated design • Develop, print and distribute updated flyers and posters • Outreach events • Continued social media posting • Continue monitoring of dedicated email address

7 Programme

The Architect Led Design Team lead in conjunction with the Project Manager (separate appointment by the Contracting Authority) will be responsible for establishing the Project Timelines and ensuring all design team parties are on track to meet the agreed dates.

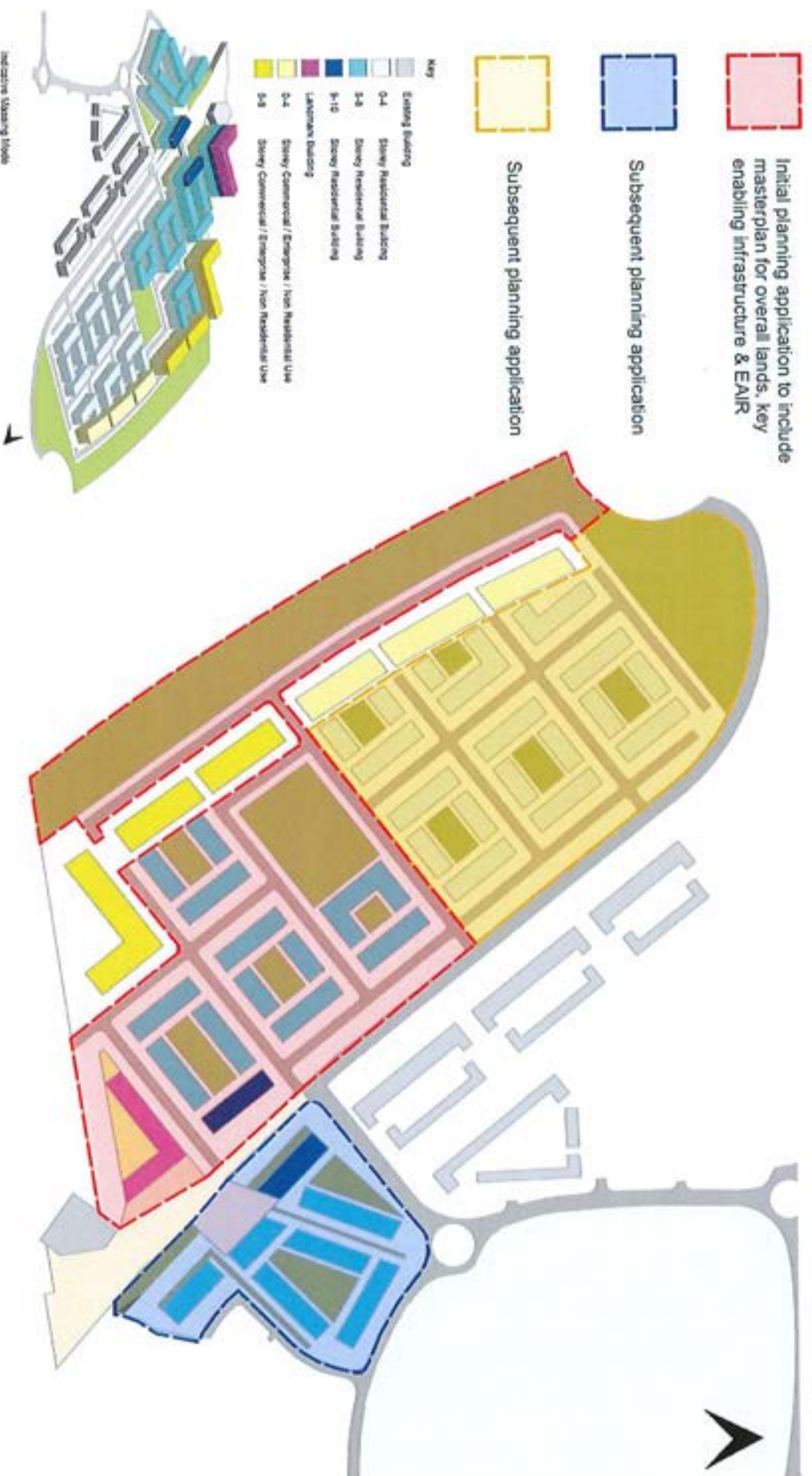
The anticipated indicative timeline for item (1.1) *Initial Planning Application* is circa 15 months, with every effort being made to improve upon this timeframe.

For anticipated indicative timelines for the other elements of the project refer to *Section 4 Project Brief Requirements*. Again, every effort being made to improve upon these timeframes.

All timings are indicative and are subject to final agreed program. All effort should be made to reduce the programme where appropriate.

It is envisaged that all Project Stages will be carried out expeditiously and within normal market delivery timeframes.

8 Cherry Orchard – Site Layout & Phasing Drawing





Professional Services
Architect Led Design Team for
Land Development Agency

Framework Scope of Services

June 2021

Table of Contents

1	Services Required.....	4
1.1	Overview	4
1.2	Safety, Health & Welfare	4
1.3	Building Control (Amendment) Regulations 2014	4
1.4	Team Disciplines.....	6
1.5	Drawing Deliverables	12
1.6	Specialist Services	13
1.7	Project Stages.....	14
2	Stage 1a – Feasibility, Urban Design / Masterplan & Outline Design Stage	15
2.1	Architectural Services and Architectural Services – Masterplan and Urban Designer	15
2.2	Mechanical & Electrical Services.....	17
2.3	Quantity Surveyor Services	18
2.4	Civil & Structural Engineering Services	19
2.5	Landscape Architectural Services.....	20
2.6	Project Supervisor Design Process (Health & Safety PSDP) Services	21
2.7	Planning and Environmental Consultancy Services	22
2.8	Traffic & Transport Services	23
2.9	Archaeology Consultancy Services.....	24
3	Stage 1b – Preliminary Design and Planning Application Stage	26
3.1	Architectural Services	26
3.2	Architectural Services – Masterplan and Urban Designer	26
3.3	Mechanical & Electrical Engineering Services.....	27
3.4	Quantity Surveyor Services	28
3.5	Civil & Structural Engineering Services	29
3.6	Landscape Architectural Services.....	30
3.7	Project Supervisor Design Process (Health & Safety PSDP) Services	30
3.8	Planning and Environmental Consultancy Services	31
3.9	Traffic & Transport Services	31
3.10	Archaeology Consultancy Services.....	32
4	Stage 2 – Detailed Design and Statutory Approvals	33

3	4.1	Architectural Services	32
	4.2	Quantity Surveyor Services	34
	4.3	Mechanical & Electrical Engineering Services.....	36
	4.4	Civil & Structural Engineering Services	38
	4.5	Landscape Architectural Services.....	39
	4.6	Project Supervisor Design Process (Health & Safety PSDP) Services	40
	4.7	Planning and Environmental Consultancy Services	40
	4.8	Traffic & Transport Services	41
	4.9	Archaeology Consultancy Services.....	41
	4.10	Assigned Certifier	42
	4.11	Design and Ancillary Certifier(s).....	42
	Stage 3 – Tender Action, Evaluation, Award.....		43
	5.1	Architectural Services	43
	5.2	Mechanical & Electrical Engineering Services.....	43
	5.3	Quantity Surveying Services.....	43
	5.4	Civil & Structural Engineering Services	46
	5.5	Landscape Architectural Services.....	46
	5.6	Project Supervisor Design Process (Health & Safety PSDP) Services	46
	5.7	Planning and Environmental Consultancy Services	47
	5.8	Traffic & Transport Services	47
	5.9	Archaeology Consultancy Services.....	47
6	Stage 4 – Construction		48
	6.1	Architectural Services	48
	6.2	Mechanical & Electrical Engineering Services.....	50
	6.3	Quantity Surveying Services.....	52
	6.4	Civil & Structural Engineering Services	53
	6.5	Landscape Architectural Services.....	55
	6.6	Project Supervisor Design Process (Health & Safety PSDP) Services	56
	6.7	Planning and Environmental Consultancy Services	56
	6.8	Traffic & Transport Services	56
	6.9	Archaeology Consultancy Services.....	56

6.10	Assigned Certifier	57
7	Stage 5 – Handover and Defects Period	58
7.1	Architectural Services	58
7.2	Mechanical & Electrical Engineering Services.....	58
7.3	Quantity Surveying Services.....	58
7.4	Civil & Structural Engineering Services	60
7.5	Landscape Architectural Services.....	60
7.6	Project Supervisor Design Process (Health & Safety PSDP) Services	61
7.7	Planning and Environmental Consultancy Services	61
7.8	Assigned Certifier	62
7.9	Multi-Disciplinary Services on Handover	62
7.10	Final Account Report Supplement	62
8	General Services for All Stages.....	63
8.1	Fire Safety Engineering	63
8.2	Disability Access Engineering.....	67

1 Services Required

1.1 Overview

This scope of the services document covers the feasibility, master-planning, preliminary design, planning application, detailed design, procurement of works contractor(s), contract administration, works supervision and handover of Project Stages of the project summarised in Section 1.6 and more particularly described in Sections 2 to 7.

The Architect Led ALDT (“ALDT”) will be responsible for providing all planning and construction-related technical advice, including Master-planning design services to the Contracting Authority A (“CA”) in respect of the project.

The ALDT will be required to liaise with the CA’s Project Manager, Property Advisor and other relevant appointed consultants, as required in the delivery of their services. The ALDT will be required to progress site feasibility studies, design studies and master planning demonstrating vision while being sensitive to the surrounding environment. The ALDT consultants will be required to provide services included in this Scope of Services document for the Project Stages.

The consultant team must perform their duties professionally, adequately, efficiently and in accordance with best practice and ethics to achieve the outputs required.

The consultant team must carry out all works in accordance with the current applicable procedures as set out in the Capital Works Management Framework documents as set out by Department of Public Expenditure and Reform and in compliance with EU and Irish legislation.

This Scope of Services document is to be read in conjunction with the Outline Brief and the Tender documents issued with the relevant request for mini-tender.

1.2 Safety, Health & Welfare

The ALDT shall address all issues related to health and safety that may be associated with the design and works and shall perform its duties in accordance with the Safety, Health and Welfare at Work Act 2005 and the Safety, Health and Welfare at Work (Construction) Regulations 2013, including the oversight of all CA obligations under the regulations. All ALDT members shall provide timely inputs into all necessary health, safety & welfare documentation including design risk assessments, preliminary and final health and safety plans and review of risk assessments and method statements.

1.3 Building Control (Amendment) Regulations 2014

Carry out the role of Design and Assigned Certifier and associated duties as required under the Building control (amendment) Regulations 2013-S.I. No 80 of 2013, S.I. No 9 of 2014 or any subsequent update in line with the agreed format of the ancillary certs and in accordance with Code of Practice for Inspecting and Certifying Buildings and Works; Building Control Regulations 2014

As a minimum this should include:

- Liaise with Employer, Project Manager and Design Team to understand the history, status and delivery programme for the project,
- Liaise with Employer, relevant Stakeholders, Project Manager and appointed Consultants / Contractors to deliver the Service,
- Develop a methodology for implementation of the Building Control (Amendment) Regulations (BCAR) on the project
- Develop a detailed inspection plan, taking account of any phasing required for the specific project,
- Inspect, and co-ordinate the inspection activities of others during construction, and certify the building/works on completion,
- Provide, sign and lodge the relevant statutory certificates - the form of undertaking at Commencement and the Certificate of Compliance on Completion.
- Provide a Monthly Progress report for the client including elemental BCAR signoff as the project progresses, to include:
 - Update on certificates received or outstanding
 - Variance/non-conformance with the inspection plan
 - % of Inspection plan and updated live progress report of inspections

The Architect will be required to act as design certifier for the project in accordance with the Building Control (Amendment) Regulations 2014.

The Architect and sub consultants will be required to provide Ancillary Certificates for the project in accordance under the Building Control (Amendment) Regulations 2014.

The CA will act as Building Owner under the Building Control Act 2014 and be responsible for paying Commencement Notice fees.

The ALDT will exercise all reasonable skill, care, and diligence to ensure that the buildings are designed and constructed in accordance with the relevant requirements of the Building Regulations. The persons assigned by them should be competent for the work they undertake.

All ALDT members will provide services and will be responsible for undertaking all activities required by designers in accordance with the Building Control Regulations 2014 as set out in the Code of Practice for Inspecting and Certifying Buildings and Works (2014):

- (a) design their respective elements of work in accordance with the applicable requirements of the Second Schedule to the Building Regulations.
- (b) provide the Design Certifier with the necessary plans, specifications and documentation that is required for lodgement at commencement stage.
- (c) arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
- (d) as agreed with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the Design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.

- (e) notify the Assigned Certifier of their proposed inspection regime for inclusion in the overall Inspection Plan.
- (f) provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier; and
- (g) maintain records of inspection.

1.4 Team Disciplines

The ALDT services will cover the following disciplines:

1.4.1 Design Team Leader

The Architectural services consultant will be the Design Team Leader (“DTL”) for all stages and will act as the single point of contractual responsibility, with the remaining key disciplines providing collateral warranties for the benefit of the CA. The Project Architect shall take overall responsibility of the ALDT and be wholly responsible for the provision of consultancy services provided by the ALDT.

The DTL will (1) coordinate the development of all design information produced by the ALDT, ensuring the production of high quality information; and (2) coordinate the activities of individual ALDT members and staff in order to efficiently deliver the services within timeframes as agreed with the CA. A senior representative of the Project Architect will be identified as the individual responsible for ensuring the role of the DTL is effectively implemented in all tenders.

The DTL shall take all instructions from, and engage with, the CA and the CA’s appointed representatives to review CA procedures and design standards to ensure adherence by the ALDT and shall act on behalf of the CA throughout the project. The DTL shall obtain permission from the CA to start each stage of the services. The DTL shall determine lines of responsibility between all ALDT members including inputs and lines of communication, reporting formats and programme each work task for all stages. The DTL shall ensure all ALDT design information is being distributed and stored appropriately via the CA’s online electronic document management system.

Each team will be required to use a common data environment for sharing project information with the design team, the LDA and specific stakeholders. The LDA is currently using the BIM 360 platform and will develop a Folder Security Matrix for each Call-off Contract. A member of the design team either the Design Team Leader or Project Manager will be requested to purchase a package of licences for each individual project. It will be the responsibility of the DTL to ensure that all ALDT members are utilising BIM 360 in a coordinated manner and in accordance with LDA document management procedures.

The DTL will be required to support the CA in managing communications with all relevant stakeholders involved in the Project. including, inter alia, planning authorities, local authorities, utility companies, adjacent landowners, developers, management companies, neighbours, statutory bodies, government departments and resident groups. LDA to pre-approve all formal communications with statutory bodies.

1.4.2 Architectural Services

The Project Architect will be required to provide all of the professional architectural services (including the specialist skills listed below) as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project. Specialist skills required are:

- a) Conservation Architect
- b) Fire Safety Design Services
- c) Disability Access Design Services
- d) Employer's Representative for the Works Contract
- e) Assigned and Design Certifier services as defined under the Building Control (Amendment) Regulations 2014
- f) Landscaping & Visual Impact Assessment (LVIA) and Graphics (including verified views and CGIS)
- g) Topographical surveys, asbestos and Measured Building Surveys of existing buildings
- h) Acoustics
- i) Sustainability Specialist(s) will be a design led role based on an energy demand reduction strategy to include advice on site planning, building fabric, developing design performance objectives & coordination of M&E inputs with architectural design as well as analysis and optimization of embodied carbon (EN15978 A1-A5) and whole life carbon (EN 15978 A1-C4) impacts of proposed construction methodologies at the appropriate project stage. Specialist should be accredited in certification of at least one of the industry-wide building energy efficiency standards/ optimization tools such as Well Building Standard, Passive House, HPI, One Click LCA etc & a have working knowledge of these standards sufficient to be able to seek and coordinate specialist advice if necessary into the design process as required to meet the agreed design performance objectives of the detailed client brief. Scope will include modelling, calculations, reporting, tender specification, drawings, site inspections and advice as required to demonstrate compliance with the agreed design performance objectives (including but not limited to energy in use, daylighting, embodied carbon & whole life carbon) for the project up to stage 5 (handover) and including input to and management of the 3rd party certification process where relevant.
- j) Site boundary identification and verification including statutory declarations of identity where required by the CA
- k) Building Surveys where required and unless otherwise stated are part of the duties of the Architect and relevant disciplines.

1.4.3 Architectural Services - Masterplan and Urban Designer

The aim of the development is to create a vibrant and varied community to provide residential & support facilities with links to the surrounding areas. In addition, environmental improvements to ensure linkages with the surrounding locality is a further key objective with the creation of strategic urban open spaces etc.

The ALDT are required to:

- Act as consultant for the design master plan for the development of the site, to include new housing, new open spaces and new community facilities; provide such drawings, 3-D models and views and reports as required to describe the plan; and participate in public display and presentations to the relevant stakeholders
- Advise on the development and interaction with community facilities (including local retail and leisure etc.)

- Examine and make recommendations for working with the proposed mix of tenure on the lands to create a sustainable model going forward. Advise on the distribution of tenures.
- Develop an integrated urban design strategy covering local transportation, cycling, movement and parking; streetscape and the public realm; place-making; boundaries and edges; integration of features; retention of trees and enhancement of tree planting; appropriate materials and building forms.
- Identify urban design characteristics for each block/zone within the masterplan lands.
- Provide a public realm design guide for use throughout the Masterplan areas
- advise on phasing and social sustainability issues.
- consideration of residential mix, form, massing, and density
- consideration of Social Sustainability
- consideration of energy requirements and efficiencies / sustainable dwellings & urban realm / Green Infrastructure
- Vehicular, cycle and pedestrian access to and from the site
- Transportation, movement, and parking are to be designed, so far as possible in accordance with the Design Manual for Urban Roads and Streets (DMURS) published by the Department of the Environment.
- Designers should advise and make design proposals generally for place making and public realm improvements generally.
- Liaise with residual team members to examine impact / limitations of the scheme vis-à-vis existing utilities and services.

The Master Planning / Urban Designer will be required to work closely with all members of ALDT and the CA's appointed consultants.

1.4.4 Civil & Structural Engineering Services

The Civil/Structural Engineer shall provide all of the professional engineering services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project.

The Civil & Structural Engineer will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.5 Mechanical, Electrical & ICT Engineering

The Mechanical & Electrical Engineer shall provide all of the Mechanical, Electrical and Information Communications Technology services consultancy services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project. These services may include specialist energy design, evaluation and input into certification services, e.g., BER, Passive, LEED, BREEAM, Wired-Score.

The M&E Engineer will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of M&E services during all project stages and to adopt an energy efficient design approach.

1.4.6 Quantity Surveyor

The QS shall provide professional quantity surveying services as necessary to comply with the Contracting Authority's (CA) instructions and to ensure a satisfactory completion of the Project. The

Quantity Surveyor shall engage directly with and act on behalf of the client to ensure accurate cost planning and ongoing monitoring of expenditure to ensure that the project is executed within the approved budget. The QS will provide information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.

The QS is to liaise with the design team, Project Manager (PM), Property Advisor, and relevant appointed consultants in addition to the LDA Development Manager (LDA DM) / Project Managers (LDA PM) and other LDA Stakeholders, including planning, legal, insurance and commercial advisors as required in the delivery of their services.

1.4.7 Landscape Architectural Services

The Landscape Architect shall provide all of the professional landscape architectural services as necessary to comply with the CA instructions and to ensure a satisfactory completion of the Project.

The Landscape Architect will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.8 Project Supervisor for the Design Process

The Project Supervisor for the Design Process shall provide all of the professional PSDP services as necessary to comply with their responsibilities under the Safety, Health & Welfare at Work (Construction Regulations)

2013, the CA instructions and to ensure a satisfactory completion of the Project.

The PSDP will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient approach.

1.4.9 Planning and Environmental Consultancy Services

The Planning and Environmental Consultant shall provide all of the professional services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project. Specialist skills required as follows / associated with the following:

- a) Expert planning advices
- b) Contaminated Land & Remediation Specialist / Construction & Demolition Waste Management Plan (C&D WMP)
- c) Asbestos Specialist d) Noise Specialist
- e) Air Quality Specialist f) Ecology
- g) Mammal Expert
- h) Ornithologist
- i) Sunlight and Daylight Impact Studies and Report
- j) Wind report
- k) Appropriate Assessment Screening and if required Natura Impact Statement.
- l) Environmental Impact Assessment and/or Statement
- m) Environmental Impact Assessment Report
- n) Ecological Impact Assessment
- o) Bat Specialist
- p) Arborist / Tree Specialist

Note a number of physical site surveys will form part of the ALDT services as noted in section 1.6 below.

The Planning and Environment Consultant will be required to work closely with the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an energy efficient.

Key tasks for the successful planning consultant during the project are:

- Arrange, chair and minute meetings with the Local Authority. Circulate the minutes of such meetings to the Client and Project Manager.
- Carry out such services as you consider necessary to maximise the Client's chances of obtaining planning permission for the development.
- Reviewing on an on-going basis the developing design to ensure that it is compatible with the requirements of the Planning Authority. Advising on areas of divergence.
- Provide a copy of the planning permission and any discharge of condition notices to the Client and Project Manager promptly
- If required, input to the report at the completion of any work stage in advance of completion of such "work stage".

1.4.10 Traffic & Transport Services

The Traffic & Transport Consultant shall provide all the professional consultancy services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project.

The Traffic & Transport Consultant will be required to work closely with the architect to ensure that traffic management, parking, and traffic impact considerations (including before and after analysis) are incorporated in the overall design.

The Traffic & Transport Consultant will be required to work closely with the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.11 Archaeology Services

The Archaeologist shall provide all of the professional services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project.

1.4.12 Technical Advisory Services

The services included herein are described on the basis that the ALDT will provide these services directly to the CA. However, the CA reserves the right to under any Call-Off Contract to novate the ALDT or any member of the ALDT to a construction contractor. In the event that any Call-off Contract proceeds on the basis of a design and build form of construction contract and the ALDT, or any part thereof, is not novated to the successful main contractor(s), the ALDT shall provide Technical Advisory services to the CA in order to, inter alia, ensure that the developed detailed design information as prepared by the construction contractor(s) shall continue to meet or exceed the CA's brief and technical requirements. The ALDT will be required to establish appropriate performance specifications and to provide all services necessary to review and certify (to the CA) the contractors' design on a timely basis. Where this requires a reduction in the scope of services being provided, a variation will be issued, and the price reduction shall be determined following negotiation and based on the applicable hourly rates. It should be noted Project Supervisor for the Design Process will not be novated to a construction contractor.

1.4.13 Due Diligence Services

The CA will be actively seeking investment opportunities in completed developments and therefore will require multi-disciplinary technical due diligence services on all aspects of completed developments to support CA and/or other funder commitments.

The requirement for due diligence services will be defined in the mini tender project brief.

- The ALDT may be required to work with the LDA and appointed, QS, Property/ Valuation, Legal and Other Advisors to complete comprehensive due diligence which will include, but is not limited to:
 - Commentary on asset and site characteristics (features inside site boundary) including overall scheme assessment, planning, unit typologies, number of 1/2/3 beds etc., development specification, unit standards and site amenities.
 - Assessment and commentary regarding viability to include:
 - Value for money,
 - Net and gross internal area including evaluation of ratios,
 - Design and cost efficiency with particular reference to layouts, bed spaces, building aspect, parking (spaces & location), private amenity space, communal amenity space, ceiling heights, fit out / furniture and specifications.
 - Environmental considerations
 - Transport and accessibility
 - Services and utilities
 - Assessment of operational costs
 - Level of affordability (rental levels / affordability threshold / future sales levels)
 - Capital requirements
 - Delivery programme & timelines
 - Sensitivity / Risk analyses
 - Other viability requirements as required
- The ALDT may be required to prepare example internal layouts as part of the due diligence process.
- Provide advice in relation to technical clauses and development specifications for inclusion in contracts.
- Provide a comprehensive due diligence report.

1.4.14 Project Monitoring Services

The requirement for project monitoring services will be defined in the mini tender project brief. If required, the following scope of service will apply:

- Ensure the interests of the LDA are protected.
- Work as part of a technical monitoring team to ensure a successful outcome for the project and completion of the development in accordance with the:
 - development agreement / other legal agreement(s),
 - all relevant laws and regulations,
 - project programme and budget
 - quality requirements defined in the development agreement.
- Provide technical advice in relation to contractual clauses and development specifications for inclusion in contracts.
- Liaise and support the LDA project team (LDA DM, PM, legal, commercial, property etc) as required in the execution of legal agreements.

- Provide monthly technical reports on project progress.
- Prepare reports and documents as required by or on behalf of the CA.
- Challenge, review, comment and provide recommendations in relation to proposals put forward by the appointed delivery team in relation to design, changes / variations etc.
 - Evaluate any technical change orders / variations proposed and recommend for completion.
- Attend meetings with the appointed delivery team in addition to meeting with the CA monitoring team.
- Review the proposed designs and challenge these designs to ensure the most cost effective and efficient solution is developed.
- Complete regular site inspections to ensure progress is in compliance with the development agreement / any associated agreements.
- Ensure compliance with any technical obligations of the contract at handover / PC.
- Provide a recommendation for release of any retention / final payments in consultation with the QS.
- Support the operational team in appointing maintenance contractors on completion of the works.
- Operate from and comply with third party document management systems as required to facilitate communication with the delivery team. Upload project documentation on to the LDA documentation management system for record.

1.5 Drawing Deliverables

As a minimum all project drawings will be delivered in 2D using AutoCAD or similar software. Some projects may be required to be delivered using BIM, where the design team are required to design in 3D to facilitate this process this will be defined in the project mini tender. Information manager and BIM Coordination Services are noted as a specialist services in section 1.6.

As noted in section 1.4.1 all teams will be required to use BIM 360 as the common data environment for the project, this platform will be used for all projects regardless of the format of drawing information.

1.6 Specialist Services

Specialist Services to be provided by ALDT and included in mini tenders (as applicable)	Specialist Services to be procured and co-ordinated by the ALDT (including all necessary documentation such as Preliminary Safety, Health & Welfare Plan) and reimbursed by the Contracting Authority (as applicable / non-exhaustive list)
<ul style="list-style-type: none"> • Archaeology Services & Reporting • Building Conservation Report • Arborist Services • Acoustic Consultant Services • Asbestos Specialist Services • Building Surveys (measurement and condition) of existing buildings • Landscaping Visual Impacts Assessment & Graphics (incl. verified views and CGIS) • Wind Modelling & Report • Environmental Assessments and Monitoring (to incl. Mammal Expert, Ornithologist, Ecologist) • Initial biodiversity & Ecological Surveys (e.g. Bat & Bird Surveys, Mammals, Invasive Plant Survey) • Air Quality & Climate Modelling & Monitoring • Background Noise Survey • Sunlight & Daylight Modelling - Impact Studies & Report • Construction & Demolition Waste Management Plan • Operational Waste Management Strategies • GPR Survey • Drainage Records • Water Supply Records • Flood Risk Assessment • Road Safety Audit • Photomontages • Creche report • Schools capacity report (if required) • Information Manager & BIM Coordination Services <ul style="list-style-type: none"> • Building Energy Modelling • Facade Specialist 	<ul style="list-style-type: none"> • Archaeology Testing • Test Trenching & Excavation Monitoring • Topographical Surveys • Biodiversity & Ecological Surveys (e.g. Bat & Bird Surveys, Mammals, Invasive Plant Survey), subsequent to initial biodiversity & ecological surveys • Ground / Geotechnical Investigations • Utilities Survey • Soil Infiltration Tests • Noise, Dust & Vibration Modelling & Monitoring • Tree Survey & Report • CCTV Survey • Pressure Testing Watermains • Waste Acceptance Criteria Assessment • Traffic Counts • Contaminated Land & Remediation Specialist • Intrusive surveys • Protected Structure fabric sampling and analysis • Asbestos Survey • Planning Application Website • Ecological monitoring services, including Ecological Clerk of Works. • Purchase of BIM 360 licences

The design team shall advise at the earliest possible stage of any other surveys that may be required for the project and shall scope and procure such surveys in consultation with the client. Such surveys could include the digging of slit trenches, camera surveys etc. It will be the responsibility of the team to source and coordinate these surveys.

1.7 Project Stages

The ALDT will be required to provide all required professional services for Stages (1a) and (1b) up to the issue of the Planning Application, and in the event of services required post lodgement of the planning application, Stages (2) through to (5) of the Conditions of Engagement, in summary:

- Stage 1(a): Feasibility, Urban Design / Masterplan, and Outline Design Stage (*up to CA approval of the Feasibility Report*)
- Stage 1(b): Preliminary Design and Planning Application Stage (*up to submission of the valid planning application(s) and if required response to a Further Information request - additional planning services post lodgement of application will be negotiated (possibly a lump sum) based on tenderers' hourly rates*)
- Stage (2): Detailed Design and submission of valid Statutory applications (*up to issue of the full tender package; to include input to the main contractor pre-qualification process and development of the tender documents*)
- Stage (3): Tender Action, Evaluation and Award (*from issue of the full tender documents to contract award*)
- Stage (4): Construction Stage (*up to Practical Completion of the final phase*)
- Stage (5): Handover Period (*up to fully operational facilities including the completion of all snagging works*)

Further details in relation to the required Consultancy Scope of Services for Stages (1) through to (5) is provided in this document.

The Project Stages may be subject to overlap depending on the circumstances and main contractor procurement and contracting strategy of any Call-Off Contract.

General services are required by all ALDT members for all stages and these include:

- Such services as are reasonable and incidental to the specific services identified below in relation to each element of the design stage
- Such services as are reasonable and required to complete each element of the design such that the Project can be completed in accordance with the Project Brief.
- as a reasonable professional consultant would contemplate or infer as being required as part of each element of the services.
- Printing (and digital copy) costs associated with submitting planning and other statutory applications
- Maintenance of the project risk register.
- Attendance and presentation at project meetings, including:
 - CA meetings
 - Stakeholder meetings
 - Local Authority / Pre-planning / Utility provider consultation meetings
 - ALDT design meetings and workshops
 - Risk workshops
 - Site meetings
 - End of stage project review meetings
 - Lessons learned sessions
- A formal design team report is required on completion of each stage for client approval.

2 Stage 1a – Feasibility, Urban Design / Masterplan & Outline Design Stage

2.1 Architectural Services and Architectural Services – Masterplan and Urban Designer

- Act as the DTL.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief including Sketch Proposals and Cost Analysis to achieve brief in advance of design
- Update and re-issue written project brief
- In consultation with the ALDT, assist the CA's appointed representative(s) to produce a Detailed Project Programme upon appointment setting out how the Project will be delivered within the required time period or by the required delivery date, and maintain this programme throughout the project lifecycle;
- Concept development.
- All liaison with the Masterplan and Urban Designer Architect and production of solutions for the best fit approach to sustainable development and vision while being sensitive to the surrounding environment.
- Assessment of risks in context of urban design and proactively lead on workshops with the ALDT as necessary to assess the mitigation measures to be implemented and progress the implementation of these mitigation measures.
- Advise the CA on any potential considerations with regard to third party engagement (i.e. boundaries, access, wayleaves, etc.) which may exist requiring legal attention.
- Investigate all possible grant schemes/funding support available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
- Make applications for the grant schemes/funding support where relevant on behalf of the CA and administer the applications as so necessary.
- Liaise with the CA / CA's Property Advisors / CA's appointed representative(s) as required to progress site feasibility studies and masterplans.
- In consultation with the CA's professional advisers and project stakeholders to develop the feasibility and possible capacity of the site for the proposed scheme undertake the following:
 - Present a project process plan for the feasibility stage for discussion and approval by the CA.
 - Collect and analyse baseline information.
 - Carry out urban design, landscape, and ecological analysis.
 - Develop a series of design and site layouts options.
 - Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
 - Feasibility testing and development of site capacities.
 - Develop design iterations, construction approaches and cost implications to achieve an environmentally & economically optimised design which fulfills the criteria of the client brief & LAP and incorporating the scope of services at 1.4.2 (i) sustainability specialist(s)
 - Ensure alignment with CA Strategies.
 - Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
 - Lead, proactively engage and manage the ALDT to review new technologies, innovative design, and methods of construction, obtaining working knowledge of Green

and Smart Technologies etc. to achieve best practice design and construction solutions where relevant to the proposed project. Such engagement to include workshops and reporting if required to feed into sustainable and economic feasibility recommendations for the development.

- Input relevant observations and findings into later phasing/design evolutions.
- Master planning, feasibility studies, condition surveys and funding proposal documentation support.
- Condition report preparation.
- Sustainability report preparation – to include overview of the coordination of inputs and advice from the Design Team & review of design options and associated impacts on costs and building performance.
- Survey existing buildings / structures on site to ascertain condition, dimensions, levels etc. or any required information to progress the design (including external survey for landscape design), following which determine scope of works, advise CA on any implications of works and report for CA review/agreement;
- Implement surveys of existing facilities, measured building surveys and prepare all relevant drawings of the existing building and associated infrastructure.
- Review current Statutory Consents, Local Authority area development plans and Authority masterplans in place in relation to the development site(s) to ensure proposals comply and amend/advise as required.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into relevant documentation.
- Advise the CA and the ALDT of all duties and responsibilities arising from the existing, planned and anticipated statutory regulations.
- Consultation on the acquisition of Statutory Approvals including Planning submission, Fire Safety Certification, Disability Access Certification, commuting, landscape, infrastructure, and other development related matters.
- Implement as required meetings with ALDT to gather all information necessary to begin the design process.
- Review outline designs to ensure compliance with obligations and Building Regulations.
- Develop schedule of works necessary to advance the initial phase of the works if required when agreed with the CA in advance - example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main Contractors. The Architect is to carry out the role of Employers Representative for the works.
- If agreed with the CA, develop a scope of works including drawing and specifications for any specialist area of work required to be procured in advance of the main contract to de-risk the site in advance of main contractor tender pricing and to expedite the works beginning onsite in a prompt manner to allow the main Contractor(s) complete the works within the required timescale.
- Provide weekly short form progress reports to CA & the CA's appointed consultants (as relevant) and monthly reports (presented at monthly CA meeting attended by all ALDT members) during this phase.
- Agree the change procedure with the CA and manage / report on same.
- Coordinate CA interface on a continual basis.
- Compile Stage 1a report coordinated with input from all ALDT consultants and obtain CA Approval.

2.2 Mechanical & Electrical Services

- Liaise with DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Liaise with the various ALDT consultants to inform the masterplan and sustainable urban design process and seek & provide relevant information as required to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL to contribute to a coordinated Detailed Project Programme as required.
- Liaise with DTL to review CA procedures and design standards to ensure adherence.
- Liaise with the DTL and ALDT Members to coordinate design elements.
- Carry-out utility availability desk-top studies.
- Survey and report on existing installation conditions and issue recommendations
- Investigate all possible grant schemes available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
- Make applications for the grant schemes on behalf of the CA and administer the applications as so necessary.
- Advise on technical guidelines, including NZEB compliance and other Industry wide energy efficiency standards e.g. Well Building Standard, Passive House, HPI etc as required
- Master-planning, feasibility studies, condition surveys and funding proposal documentation support.
- Condition and sustainability report preparation.
- Attend site visits to review existing facilities identified for refurbishment / adaptive re-use as agreed with the CA.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme including the following:
 - Assist with formulation of a project process plan for the feasibility stage and present to the CA for discussion and approval.
 - Collect and analyse baseline information.
 - Assist with urban design analysis and attend workshops, as necessary.
 - Assist with development of a series of design and site layouts options
 - Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
 - Feasibility testing and development of site capacities.
 - Review alternative design and construction approaches and cost implications
 - Ensure alignment with CA Strategies.
 - Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
 - Support the Architect, and other ALDT members, with feasibility strategies for the Project including attendance and participation in workshops, reporting and recommendations.
- Develop outline Electricity, Gas, Water, communication infrastructure in line with the CAs requirements

- Provide cost valuation support to ALDT and value engineering activities
- Advise on cost implications of various options and any alternative design as required.
- Develop a schedule and if necessary, a BOQ for works necessary to advance the initial phase of the works - example: strip out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- Advise on tendering procedures
- Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Input into Stage 1a report, as necessary.

2.3 Quantity Surveyor Services

- Liaise with the CA and appointed consultant team to determine the CA's initial requirements and input into the development of the project brief.
- Review and comment on the preliminary budget approval for the project with respect to the project brief.
- Undertake a site visit (to each site if more than 1no.) and review all existing information, including existing site surveys, draft masterplans, reports, health and safety risk assessment(s):
 - Identify any information gaps that may exist and advise on the commercial impact of same.
 - Advise on additional surveys that may be required and procure surveys on behalf of the CA.

Prior approval for all additional work is to be provided by the CA.
- Prepare commercial reports and cost plans as required for presentation to LDA departments / other stakeholders.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.
- Advise on potential procurement options and feasibility of the various options.
- Provide a high-level overview of the commercial constraints within which the ADLT must work and prepare an initial budget estimate from feasibility studies.
- Participate in project meetings including design team meetings to ensure the design progresses in accordance with the budget.
- Participate in and provide cost advice for optioneering exercises.
- Manage, control and monitor M&E cost and prepare cost estimates, liaising with the Mechanical and Electrical (M&E) Sub Consultant to ensure that cost estimates for M&E are appropriate and reflective of the design intent and brief.
- Prepare overall project cost calculation and cash flow projections.
- Prepare the overall project Development Budget, complete with detailed cash flow in the standard LDA Development Budget template. To be carried out in conjunction with the Project Manager. Obtaining information from the Team as required with respect to soft costs and cash flow.
- Produce a detailed benchmark cost analysis of schemes of a similar nature for consideration by the LDA.
- Summarize Cost Estimates in the LDA standardized Cost Headings and to populate standardized LDA Typology Template.
- Produce Key Building Design Metrics document & tracker which will ensure optimum value for money and efficiencies in the design Present to the Design Team and track inclusion of metrics in the evolving design.

- Where BIM is being utilized on the project liaise with the Design Team in terms of information required within the model to aid quantification and quantity extraction in an efficient manner. Assisting in the production of the Employers Information Requirements and BIM Execution Plan, setting out clearly the information the QS requires to be included in the model(s) at each Stage of the project
- Provide information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.
- Prepare a commercial report for inclusion in the Stage 1a Design Report to be issued by the consultant team on completion of the stage. This is to include potential procurement options and associated risks and opportunities for client consideration.

2.4 Civil & Structural Engineering Services

- Liaise with the DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL, contribute to a coordinated Detailed Project Programme as required.
- Liaise with the DTL and ALDT Members to coordinate design elements.
- Carry-out site condition and ground contamination desk-top studies.
- Coordinate and Prepare as required Flood Risk Assessment, Engineering Services Report, Mobility Management Plan, Traffic & Transportation Assessment, Construction & Environmental Management Plan.
- Surveys – progress any required surveys required to progress design including survey & report on existing structure & infrastructure
- Attend site visits to review existing facilities identified for refurbishment / adaptive re-use as agreed with the CA.
- Investigate all possible grant schemes available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
- Make applications for the grant schemes on behalf of the CA and administer the applications as so necessary.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme including the following:
 - Assist with formulation of a project process plan for the feasibility stage and present to the CA for discussion and approval.
 - Collect and analyse baseline information.
 - Assist with urban design analysis and attend workshops, as necessary.
 - Assist with development of a series of design and site layouts options with particular reference to the potential for integration of green infrastructure & coordination with Urban Designer, Landscape Architect & Ecologist.

- Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
- Feasibility testing and development of site capacities.
- Review alternative design and construction approaches and cost implications
- Ensure alignment with CA Strategies.
- Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
- Support the Architect, and other ALDT members, with feasibility strategies for the Project including attendance and participation in workshops, reporting and recommendations
- Liaise with DTL to review CA procedures and design standards to ensure adherence.
- Develop outline structural infrastructure and building opening requirements
- Audit existing infrastructure, potential strengthening, and replacement requirements
- Master-planning, feasibility studies, condition surveys and funding proposal documentation support.
- Condition and sustainability report preparation.
- Generate options to meet outline requirements
- Develop outline design drawings and issue to the ALDT in a timely manner
- Prepare cost estimates for the structural services and issue to Quantity Surveyor & DTL.
- Draft a strategy for structural infrastructure
- Advice on compliance with Building Regulations / other statutory requirements
- Report on existing installations
- Develop schedule of works as necessary to advance the initial phase of the works - example: strip out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Input into Stage 1a report, as necessary.

2.5 Landscape Architectural Services

- Contribute to the development and preparation of Project Brief in consultation with the DTL.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process. Include coordination with Ecologist, Urban Designer and Structural & Civil Engineer to explore integration of green infrastructure in to Landscape design.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL, contribute to a coordinated Detailed Project Programme as required.
- Contribute to the development of best practice design & construction solutions for successful delivery of affordable permanent occupancy residential units.
- Contribute to the examination and preparation of alternative design solutions, adjustments and design revisions as required to meet the Project brief and budget.
- Assist with urban design analysis and attend workshops, as necessary.

- Contribute to the preparation of a full and complete statement of the CA's functional, aesthetic, and operational requirements for the Project.
 - Advise and assist the DTL / Quantity Surveyor in developing the Project Budget.
- Contribute to preliminary cost estimates and Outline Cost Plan for the project and assessment against the agreed budget.
- Carry out design review with reference to functionality, efficiency, sustainability, commercial liability, economy, whole life costs and suitability for financing, sale, or lease, as may be required.
- Site appraisal and report – Carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- Advise the DTL on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA's requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Contribute to the Scheme Design and general design Specification in accordance with the Project Brief.
 - Comply with design production programmes set by the DTL.
 - Contribute to pre-planning and any other necessary statutory or regulatory consultation as required.
 - Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
 - Contribute to site investigation process, site surveys and tests, examination of availability of public utilities and associated reports.
 - Input into Stage 1a report, as necessary.

2.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended, notwithstanding any inconsistent Contract contents.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Confirm compliance with PSDP duties in respect of this stage.
- Liaise with the DTL and members of the ALDT to ascertain a full understanding of design risk assessments and provide advice as required.
- Assist in preparation of Stage report for CA review.

- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Site visits as required during this stage.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Provide Health and Safety expertise and input at all stages of the Preliminary design phase of the project
- Compile design risk assessments as required.
- Input into Stage 1a report, as necessary.

2.7 Planning and Environmental Consultancy Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Advise on the appropriate planning strategy for the site taking account of the various elements of works proposed. Manage and coordinate the strategic planning advice and all associated planning documentation required during the feasibility stage of the project.
- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek to provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend workshops as necessary to input into the urban design analysis.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme immediately on appointment setting out how the Project will be delivered within the required time period or by the required delivery date specifically in relation to planning / environmental programme constraints.
- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.
- Advise the DTL on potential project risks.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports. Ensure that timeframe for commissioning of surveys and reports is highlighted at the earliest stage of the project to ensure all wildlife surveys are carried out at appropriate times. At a minimum, a baseline ecological survey should be carried out to include recommendations for biodiversity enhancement measures and potential for biodiversity corridors & links to wider area . Planning Consultant will ensure dissemination and coordination of these reports and recommendations with the landscape architect, urban designer & civil engineering consultants for integration in to masterplan proposals as appropriate.
- Advise the DTL in relation to advance works requirements where applicable.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.

- Provide a comprehensive Town Planning Evaluation Report to the Design Team which sets out the basic planning principles and parameters within which the design will evolve, and the final design should be structured.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Assist with development of a series of design and site layouts options.
- Appropriate Assessment Report.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Advise on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA's requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Review and advise upon the planning history of the subject site, relevant adjacent sites, and the strategic and statutory planning context. Comment on the project brief and design proposals in the context of the planning constraints and opportunities.
- Assist in preparation of Stage 1a report for CA review

2.8 Traffic & Transport Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend workshops as necessary to assist with urban design analysis.
- Prepare and assist ALDT with formulation of Mobility Management Plans, Traffic & Transportation Assessments, Construction & Environmental Management Plans.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in their occupancy.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports.
- Carry-out (appoint and administer) required surveys and market research as is necessary.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme.
- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.

- Advise the DTL on potential project risks.
- Advise the DTL in relation to advance works requirements where applicable.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Assist with development of a series of design and site layouts options
- Advise on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA's requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Assist in preparation of Stage 1a report for CA review

2.9 Archaeology Consultancy Services

- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Conduct an archaeological desktop study to advise on the archaeological characteristics of the site and associated mitigation measures.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports.
- Advise the DTL in relation to advance works requirements where applicable.
- Carry-out (appoint and administer) required surveys and research as is necessary.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme
- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.

- Assist in preparation of Stage 1a report for CA review

3 Stage 1b – Preliminary Design and Planning Application Stage

3.1 Architectural Services

- Act as DTL.
- Lead the ALDT consultants' input to updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Utilise appropriate sustainable and environmental design concepts as agreed with the CA.
- Prepare a sustainability report for the development.
- Prepare detailed masterplan for the site(s).
- Liaise with designers to review design progress and to advise to ensure compliance with regulations and obligations.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement.
- Confirm the results of surveys have been considered in the outline design and Planning Application.
- Develop design and construction approaches to achieve an environmentally & economically optimised design which fulfills the criteria of the client brief & LAP and incorporating the scope of services at 1.4.2 (i) sustainability specialist(s)
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into outline design drawings and Planning Application.
- Provide planning consultancy and advice throughout the design phase as required.
- In consultation with the ALDT, prepare and collate necessary reports required for Planning Applications.
- Provide information for the preparations of a project cost plan.
- Monitor and Report on Design plans & timelines for participation by ALDT members, CA, and other relevant parties.
- Provide all imagery (3D images and graphics) for Planning Application.
- Provide all necessary preliminary certifications at this point (e.g., Well)
- Provide fortnightly progress reports to CA during this phase
- Ensure the planning application is feasible from a fire safety and disability access design perspective, as necessary.
- Stage 1b progress report to CA prior to issue Planning Application with input from all ALDT consultants and obtain CA Approval:

3.2 Architectural Services – Masterplan and Urban Designer

- Liaise with DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Consult with the ALDT consultants to update / develop proposals throughout this stage to further address the scope of services identified at Stage 1a taking on board, where relevant, engagements with Stakeholders.
- Prepare a design master plan for the development, to include new housing, new open spaces and new community facilities; provide such drawings, 3-D models and views and reports as required to describe the plan; and participate in public display and presentations to the relevant stakeholders.

- Advise on the development and interaction with community facilities (including local retail and leisure etc.).
- Update recommendations, if required, for working with the proposed mix and distribution of tenures on the lands to create a sustainable model going forward.
- Assist and input into the preparation of Planning Application during this stage.
- Advise the CA / lead Architect on any potential considerations with regards third party engagement (i.e. boundaries, access, wayleaves, etc.).
- Carry out required modelling and analysis as necessary for Planning Application.
- Liaise with the project team to update risk assessments in context of masterplan and urban design and attend workshops with the ALDT as necessary to assess and implement mitigation measures.
- Input into the Stage 2b report.

3.3 Mechanical & Electrical Engineering Services

- Continue engagements with utilities providers where necessary to determine existing services to/from the site.
- Identify Electrical, Gas, Water, communications infrastructure, Supply availability, costs etc. and arrange any specialist surveys on services to be carried out – e.g. Vibration isolation, etc.
- Prepare and submit necessary enquiries and applications to utility providers. Advise DTL and CA of any implications. Liaise with Quantity Surveyor to ensure any abnormal costs are reflected in the cost plan.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Build in future flexibility as a critical design factor
- Life cycle cost assessments where appropriate such as heating, energy performance, sustainability, etc.
- Planning and negotiating with supply authorities in connection with the provision and installation of supplies, as necessary.
- Prepare business case studies for alternative options for energy distribution within the development, e.g., centralised versus decentralised systems.
- Prepare all coordinated outline design drawings and documentation for Planning Application
- Provide all required information to the Quantity Surveyor, as necessary.
- Prepare site plans and input into detailed coordinated masterplan for Planning Application.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement
- Confirm the results of surveys have been considered in the Outline design and Planning documents.
- Liaise with adjacent landowners, as necessary.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare BER(s) as required.
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Input as required into Stage 1b reports to the CA.

- Carry out required modelling and analysis as necessary for Planning Application
- Provide all necessary preliminary certifications at this point (e.g., BER)
- Assist the DTL in ensuring the planning application is feasible from a fire safety and disability access perspective, as necessary.
- Demonstrate compliance with Building Regulations / other statutory requirements.

3.4 Quantity Surveyor Services

- Carry out a cost review of the preliminary design. Make recommendations on alternative preliminary design and construction options in respect of costs, including but not limited to appropriateness of construction, economy of construction per building element/key materials and key items to be included in the output specifications.
 - Advise on cost of design team proposals, including effects of site usage, shape of buildings, alternative forms of design and construction as design develops.
 - Assess options for building services design with the M&E sub consultant and advise on costs and life-cycle costing as appropriate.
 - Participate in and provide cost advice for optioneering exercises.
- Prepare an Outline Cost Plan to include all project costs (e.g. Capex cost, FM Services cost and Lifecycle cost if applicable) and prepare associated cash flow forecasts for issue to the Client. This shall present costs at a high level on a site by site basis and aggregate basis (format to be agreed with the Client) and shall show the appropriate VAT rate.
- Prepare the overall project Development Budget, complete with detailed cash flow in the standard LDA Development Budget template. To be carried out in conjunction with the Project Manager. Obtaining information from the Team as required with respect to soft costs and cash flow.
- Produce a detailed benchmark cost analysis of schemes of a similar nature for consideration by the LDA.
- Summarize Cost Estimates in the LDA standardized Cost Headings and to populate standardized LDA Typology Template.
- If requested produce the Outline Cost Plan in accordance with the new International Construction Measurement Standards.
- Manage and prepare M&E cost estimates, liaising with the Mechanical and Electrical (M&E) Sub Consultant to ensure that cost estimates for M&E are appropriate and reflective of the design intent and brief. Prepare, in conjunction with the M&E consultant M&E cost options analysis including cost in use and life cycle costing of systems.
- Produce Key Building Design Metrics document & tracker which will ensure optimum value for money and efficiencies in the design. Present to the Design Team and track inclusion of metrics in the evolving design.
- Where BIM is being utilized on the project liaise with the Design Team in terms of information required within the model to aid quantification and quantity extraction in an efficient manner. Assisting in the production of the Employers Information Requirements and BIM Execution Plan, setting out clearly the information the QS requires to be included in the model(s) at each Stage of the project.
- Provide information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.
- Attend Preliminary Design meeting(s) with the Client to review the preliminary design, planning application and project costings.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.

- Prepare a commercial report for inclusion in the Stage 1b Design Report to be issued by the consultant team on completion of the stage including the recommended procurement strategy.

3.5 Civil & Structural Engineering Services

- Consider relevant reports, data, and information available and arrange surveys of the site as required including a survey of the existing foul and surface water drainage system (at the CA cost).
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Liaise with the CA representative and make sure those relevant and appropriate factors from the end-user's specialist functions are incorporated into the designs
- Build in future flexibility as a critical design factor
- Assess existing structure and site surveys and complete additional surveys as required e.g. vibration, isolation etc.
- Generate relevant data and reports for the ALDT, and review this data against scheme design and report any anomalies to the DTL / CA.
- Prepare detailed masterplan for the site.
- Liaise with adjacent landowners, as necessary.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Advice on compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the outline design and Planning Application.

Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;

- Prepare Construction Management Plan as required by planning application
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Input as required into Stage 1b reports to the CA

3.6 Landscape Architectural Services

- Prepare detailed masterplan for the site.
- Prepare outline sketch design incorporating landscaping layout, accompanied by sections and elevations indicating the general character and massing of the planting. A number of options may need for approval prior to Planning Application.
- Provide all necessary Landscaping Services cost advice to the DTL / Quantity Surveyor.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Revise as necessary the Landscaping documentation as required to meet the Project Brief and Budget following consultation with the ALDT / CA in advance of Planning Application.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the outline design and planning application.
- Support the Architect, and other ALDT members as necessary in the utilisation of best practice construction methods & construction solutions where relevant, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents;
- Prepare Planning Permission application submission documentation and drawings.
- Assist in the planning application, ensure compliance with the planning context to include all associated technical reports as required.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Comply with design production programmes by the ALDT to meet the agreed Programme.
- Attend to consultation and liaison with adjoining owners or interests, as required.
- Input as required into Stage 1b reports to the CA

3.7 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended, notwithstanding any inconsistent Contract contents.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Provide Health and Safety expertise and input at all stages of the design phase of the project
- Compile all necessary design risk assessments.
- Input as required into Stage 1b reports to the CA

3.8 Planning and Environmental Consultancy Services

- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders as required.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Contribute to a project specific sustainability and energy use strategy and satisfies the CAs requirements in a cost-effective manner.
- Collaborate with the ALDT in formulating recommended design solutions for CA approval and subsequent development.
- Contribute to site investigation process, site surveys and tests, examination of availability of public utilities and associated reports.
- Prepare preliminary Environmental Consultancy Services drawings and report. A number of options may need to be examined to satisfy the CA needs, Cost Limits and Planning requirements.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
 - Prepare any documents needed for the planning application which are not specifically identified as being prepared by others including but not limited to any planning policy statement or statement of community involvement if required for the application.
- Appropriate Assessment Screening and if required Natura Impact Statement.
- Ecological Impact Assessment.
- Environmental Impact Assessment Screening for the site, in co-operation with the other ALDT members, a full Environmental Impact Assessment Report (to include all associated surveys and reports).
- Prepare design for Environmental elements.
- Revise as necessary the Environmental Services documentation following a review with the DTL and the CA and submit revisions for approval.
- Coordinate the planning application, ensure compliance with the planning context to include all associated technical reports as required.
- Review drawings and planning application information pre-lodgement to ensure the package is appropriate for the application, from a planning perspective.
- Co-ordinate and lodge planning application including preparation of statutory notices, application form, application fee calculation and planning report.
- Issue a Schedule of Documents for the planning application detailing the specific documents required for the application and associated responsible party.
- Assist DTL in the preparation of a detailed coordinated design programme for this stage.
- Assist in preparation of Stage 1b reports for CA review.
 - Lessons learned sessions
- Ensure all documents formally submitted to Local Authorities are saved to project document management system.

3.9 Traffic & Transport Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in occupancy.
- Prepare preliminary Traffic & Transport Services drawings and report. A number of options may need to be examined to satisfy the CA needs, Cost Limits and Planning requirements (including further Fire Safety and Disability Access requirements).
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Prepare road safety audits as required for the planning application.
- Input into Construction Management Plan as required by planning application
- Provision information to the DTL / Quantity Surveyor, as necessary.
- Assist in preparation of Stage 1b reports for CA review

3.10 Archaeology Consultancy Services

- Contribute to pre-planning, fire safety and any other necessary statutory or regulatory consultations as required.
- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
- Prepare preliminary Archaeology Consultancy Services drawings and report for Planning Application.
- Prepare developed sketch / outline design for Archaeological elements.
- Provide information to the Quantity Surveyor and other Consultants to enable quantification for preparation of cost estimates and Cost Plan.
- Liaise with statutory bodies, as necessary.
- Contribute to the planning application, as necessary.
- Assist in preparation of Stage 1b reports for CA review

4 Stage 2 – Detailed Design and Statutory Approvals

4.1 Architectural Services

- Act as DTL.
- Coordinate the compliance responses to planning conditions once received. Prioritise the “prior to commencement” planning conditions.
- Directly prepare the response to individual planning conditions.
- After reviewing the existing CA data and consulting fully with the CA, complete detailed interior design & finalized space planning layouts.
- Develop detailed design drawings and specifications for tender.
- Utilise appropriate sustainable and environmental design concepts as agreed with the CA.
- Liaise with designers to review design progress and to advise to ensure compliance with regulations and obligations.
- Develop design programme; consider construction and procurement phasing; input into the contracting and procurement strategy.
- Prepare detailed cash flow for the period up to start of construction to include all ALDT fees and associated survey costs.
- Liaise as necessary with adjacent landowners, development partners to obtain all approvals
- Advise on, procure, and administer all necessary site surveys to support the detailed design.
- Oversee the application for all statutory licenses including archaeological, ecological, contamination, asbestos and oversee the associated mitigations.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement.
- Detail and specify fully all elements, including compliance with the requirements of the Building Control (Amendment) Regulations 2014 and the Code of Practice for Inspection and Certifying Building and Works.
- Confirm the results of surveys have been considered in the detailed design.
- Develop design iterations, construction approaches and cost implications to achieve an environmentally & economically optimised design which fulfills the criteria of the client brief & LAP and incorporating the scope of services at 1.4.2 (i) sustainability specialist(s)
- Advise the CA and ALDT of all obligations relating best practice design & construction solutions for successful delivery of affordable permanent occupancy residential units during this stage.
- Prepare and lodge Fire Safety Certification application, Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into detailed design, Statutory Approvals Applications, and tender documentation.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into outline design drawings and Planning Application.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, prepare, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare Additional / Further Information responses, Planning Compliance submission(s) and submit to authorities if required.

- Provide planning consultancy and advice throughout the design phase as required.
- Advise the CA and ALDT of all duties and responsibilities arising from existing planned and anticipated statutory regulations.
- Provide Daylight and Sunlight Analysis.
- Provide information for the preparations of a project cost plan.
- Develop schedule of works necessary, if required, to advance the initial phase of the works- example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- If agreed in advance with the CA, Develop a scope of works including drawing and specifications for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor complete the works within the required timescale.
- Coordinate the work of all ALDT members in drawing up production information for tender documentation to provide a fully documented proposal for the tender evaluation phase.
- Arrange sample finishes presentation for CA sign off
- Prepare and agree with the CA a procurement strategy for the projects – 2 stage restricted procedures (OJEU) to be assumed.
- Produce comprehensive Works Requirements documents including performance specifications with input from the ALDT members.
- Coordinate a structured set of tender documents with all coordinated detailed design drawings and specifications for the works from the ALDT.
- Prepare Preliminary Inspection Plan (PIP) in consultation with the ALDT members in compliance with the Building Control (Amendment) Regulations 2014 and the Code of Practice for Inspection and Certifying Building and Works.
- Oversee the formulation of all tender documents, including Suitability Assessment Questionnaires (SAQ), Requests / Invitations to Tenderers, evaluation criteria, Forms of Tender and associated information documents with input from the ALDT and CA as required, and ensure fully documented proposal for shortlisting (SAQ), tendering and subsequent tender evaluation;
- Input as necessary into main contractor pre-qualification process.
- Advise, procure, and oversee any required enabling works.
- Provide imagery for project promotional material – provision of 3D images and graphics.
- Provide appropriate detail drawings; 1:10; 1:25; 1:50 for proper detailing and analysis
- Provide all necessary detailed certifications at this point (e.g., Well)
- Provide fortnightly progress reports to CA during this phase
- Prepare Stage 2 Report including pre-tender cost plan – present to CA towards the end of stage

4.2 Quantity Surveyor Services

- Prepare a Detailed Cost Plan (format to be agreed with the Client) with reference to the Preliminary Design and all project costs applying a top-down and bottom-up estimating approach. The Detailed Cost Plan is to include the following:
 - Capex costs including, main works (including M&E and ICT), fittings and equipment, external works, off-site works, abnormalities, works in connection with Statutory Consents and risk costs
 - Opex costs including operating, maintenance (soft and hard)
 - Lifecycle costs, where required

- Enabling/advance works costs (if any)
- Inflation indices and VAT figure(s)
- Unit rates used are to be substantiated with reference to relevant building rates, benchmark costs/projects, market rates/prices and any other key items and shall be measured, priced, and itemised on an elemental basis. Cost for items, such as furniture, fittings, and equipment (FF&E) (prepared with reference to a detailed matrix) and FM Services shall be itemised and demonstrated with reference to market rates.
- Insurance reinstatement costs
- Cashflow forecasts in respect of the key cost headings and an assumptions report.
- A detailed cost model for each cost heading including:
 - Lifecycle costs (with reference to building element, frequency of replacement, costs etc.)
 - Facilities management costs with reference to service delivery model, staffing costs, contracted services costs etc.)
 - FF&E (itemised with reference to market prices) [potentially where LDA retains ownership in a “Cost Rental” model].
- Prepare the overall project Development Budget, complete with detailed cash flow in the standard LDA Development Budget template. To be carried out in conjunction with the Project Manager. Obtaining information from the Team as required with respect to soft costs and cash flow.
- Produce a detailed benchmark cost analysis of schemes of a similar nature for consideration by the LDA.
- Summarize Cost Plans and Pre-tender Estimate in the LDA standardized Cost Headings, across respective tenures, phases and sections and populate standardized LDA Typology Template.
- If requested produce the Cost Plan and Pre-tender estimate in accordance with the new International Construction Measurement Standards.
- Manage and prepare M&E cost estimates, liaising with the Mechanical and Electrical (M&E) Sub Consultant to ensure that cost estimates for M&E are appropriate and reflective of the design intent and brief. Prepare, in conjunction with the M&E consultant M&E cost options analysis including cost in use and life cycle costing of systems.
- Produce Key Building Design Metrics document & tracker which will ensure optimum value for money and efficiencies in the design. Present to the Design Team and track inclusion of metrics in the evolving design.
- Maintain and update cost plans to reflect any design changes during the detailed design process. Prepare periodic reports and updated cash flow forecasts as required.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.
- Preparing such final calculations and details relating to the Works as may be required for submission for an independent check by others nominated by the CA.
- Prepare a pretender estimate for CA review prior to tender and advise on future anticipated inflation.
- Finalise the procurement strategy in consultation the PM and key design team members and seek approval of same from the LDA.
- Draft standard tender documents required under public procurement legislation such as Invitation to Tender, Prior Information Notices and liaise with the LDA to finalise and approve.
- Review detailed design and comment on commercial impact of final tender documents / drawings.
- Prepare Pricing Document in appropriate A.R.M. format and any additional procurement documents ready for tender action. This will include all relevant Procurement Documents required for tendering in accordance with Public Procurement Guidelines and all relevant legislation.

- The Mechanical and Electrical Sub Consultant to provide commentary on the QS M&E a pre-tender estimate.
- Detailed measured M&E schedules and quantities, in order to ensure that building service installations are incorporated into the detailed Bills of Quantities (BOQ) in accordance with ARM4, or the most recent publication at the time of the PTE, Supplement 2 or similar.
- Where BIM is being utilized on the project liaise with the Design Team in terms of information required within the model to aid quantification and quantity extraction in an efficient manner. Assisting in the production of the Employers Information Requirements and BIM Execution Plan, setting out clearly the information the QS requires to be included in the model(s) at each Stage of the project.
- Provide information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.

4.3 Mechanical & Electrical Engineering Services

- Identify Electrical, Gas, Water, communications infrastructure, Supply availability, costs etc. and arrange any specialist surveys on services to be carried out – e.g. Vibration isolation, etc.
- Apply for all utility connections and maintain a utilities tracker with reports issued to the DTL / CA as required.
- Liaise with the CA representative and make sure that relevant and appropriate requirements for the end user specialist functions are incorporated into the design.
- Build in future flexibility as a critical design factor
- Prepare pre-tender estimate for the building services and issue to quantity surveyor.
- Life cycle cost assessments where appropriate such as heating, energy performance, sustainability, etc.
- Planning and negotiating with supply authorities in connection with the provision and installation of supplies, as necessary.
- Prepare all coordinated detail design drawings and documentation for tender packs
- Prepare all coordinated design / tender drawings and specifications for the works in accordance with the relevant contracts.
- Produce comprehensive Works Requirements documents, all coordinated detailed design drawings and specifications for the works including performance specifications.
- Input to the completion of all tender documents, including Suitability Assessment Questionnaires, Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.
- Input into main contractor pre-qualification process.
- Complete detailed design of all mechanical building services
- Prepare and Complete the detailed design of all Electrical & information communication & technology building services
- Prepare detailed Mechanical & Electrical / Building Services design documents, drawings, and Specifications.
- Provide all required information to the Quantity Surveyor, including detailed measured M&E schedules, in order to ensure that building service installations are incorporated into the detailed Bills of Quantities (BOQ) in accordance with ARM4, or the most recent publication at the time of the PTE, Supplement 2 or similar.

- Provide commentary on the QS M&E a pre-tender estimate.
- Consider and determine the interface required between building services and the specialist equipment
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement
- Confirm the results of surveys have been considered in the detailed design.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare BER(s) as required.
- Ensure all building layout designs are fully coordinated with M&E design
- Ensure all external areas undergo an underground spatial coordination analysis for pipe and ducting runs including chambers and also surface chamber cover layout design is coordinated within the public realm
- In conjunction with other ALDT Members, prepare Fire Safety Certification application and Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Optimise and provide all anticipated energy consumption data to the DTL and CA.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare Additional / Further Information responses, planning compliance submissions and submit to authorities if required
 - Carry out all modelling, preparation, testing, imaging as necessary to meeting design brief and/or operational requirements of building
 - Demonstrate compliance with Building Regulations / other statutory requirements.
 - Develop a schedule and if necessary, a BOQ for works necessary to advance the initial phase of the works - example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
 - Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Provide all necessary detailed certifications at this point (e.g., BER)
- Input as required into Stage 2 reports to the CA.

4.4 Civil & Structural Engineering Services

- Consider relevant reports, data, and information available and arrange surveys of the site as required including a survey of the existing foul and surface water drainage system (at the CA cost).
- Liaise with the CA representative and make sure those relevant and appropriate factors from the end-user's specialist functions are incorporated into the designs
- Build in future flexibility as a critical design factor
- Generate relevant data and reports for the ALDT, and review this data against scheme design and report any anomalies to the DTL / CA.
- Develop detailed design production documents, drawings, and specification from approved outlined proposals in a timely manner to allow the preparation of the tender documents, Bill of Quantities, and pretender cost estimate.
- Prepare detailed design and design calculations for the site.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Advice on compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the detailed design.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare Fire Safety Certification application, Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, prepare, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare all coordinated design / tender drawings and specifications for the works in accordance with the relevant contracts.
- Produce comprehensive Works Requirements documents, all coordinated detailed design drawings and specifications for the works including performance specifications.
 - Input to the completion of all tender documents, including Suitability Assessment Questionnaires, Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.
- Input into the main contractor pre-qualification process.
- Develop schedule of works necessary, if required, to advance the initial phase of the works. Example: A isolation of existing utilities to facilitate the speedy commencement of works by the main contractor.
- Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Ensure all external areas undergo an underground spatial coordination analysis for pipe and ducting runs including chambers and also surface chamber cover layout design is coordinated within the public realm
- Input as required into Stage 2 reports to the CA.

4.5 Landscape Architectural Services

- Prepare detailed masterplan for the site.
- Prepare outline sketch design incorporating landscaping layout to a scale of not less than 1:200 illustrating how it is proposed to provide the areas set out in the Project brief. The plans shall be accompanied by sections and elevations indicating the general character and massing of the planting. A number of options may need to be examined to satisfy the CA requirements, cost limits and planning, fire safety, disability access and health and safety requirements. The design must be reconciled with the brief requirements. Submit outline sketch design to CA.
- Participate with the ALDT and other consultants in value engineering and life cycle costing exercises.
- In consultation with the Quantity Surveyor provide all necessary Landscaping Services cost advice, investigation, and support to the ALDT including examination of alternative designs, adjustments, and revisions to meet the Project Brief and Budget. Prepare costings for landscaping design options or alternative designs as required.
- Arrange for a detailed review with the DTL of the Landscape drawings and specifications, and formally confirm that they have been prepared in accordance with the Project Brief and that they are consistent with architectural drawings.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the detailed design.
- Support the Architect, and other ALDT members as necessary in the utilisation of best practice construction methods & construction solutions where relevant, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents;
- Prepare required drawings and documents for input with Fire Safety Certification & Disability Accessibility Certificate applications
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
 - Respond where required to Additional / Further Information requests, planning appeal process if applicable, and assessment and compliance with planning conditions (if required).
- Comply with design production programmes by the ALDT to meet the agreed Programme.
- Carry out whole life cost assessments as required in consultation with the Quantity Surveyor.
- Prepare detailed specification documentation for the works, including samples, testing, prototype, and QA procedures, with particular regard to sustainability, quality and standards required.
- Assist the DTL in the preparation of a report on the Detailed Design addressing all aspects of the developed design in an integrated manner in relation to the Project Brief, key stakeholder requirements, accommodation, and budget. Assist in a full design briefing to the CA.
- Conduct design review with reference to functionality, efficiency, sustainability, commercial viability, economy, whole life costs as may be required.
- Produce comprehensive works requirements documents, all coordinated detailed design drawings and specifications for the works.

- Input to the completion of all tender documents, including Suitability Assessment Questionnaires, Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.
- Prepare and complete Works' Contract production information including detailed Specialists' design for tender documentation, tender drawings, specifications, and Forms of Tender to provide a fully documented proposal for tendering and subsequent tender evaluation.
- Input as required into Stage 2 reports to the CA

4.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Provide Health and Safety expertise and input at all stages of the design phase of the project
- Compile design risk assessments from the relevant ALDT members.
- Issue a preliminary H&S plan to form part of the tender documentation.
- Assist in preparation of Stage 2 report for CA review.

4.7 Planning and Environmental Consultancy Services

- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders as required.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Prepare design for Environmental elements.
- Revise as necessary the Environmental Services documentation following a review with the DTL and the CA and submit revisions for approval.
- Review on an on-going basis the design to ensure that it is compatible with the requirements of the Planning Authority.
- Prepare Planning Compliance submission(s) and submit to authorities.
 - Provide the Client with a report on the conditions attached to any consent if required
 - Agree with the Client and other Consultants a programme for the submission of information to discharge the conditions.
 - Agree the discharge of conditions with the Local Authority.
- Advise on, prepare, and respond where required to Additional / Further Information requests, planning appeal process if required. Preparation of First party Appeal against (i) conditions or (ii) Refusal of Permission (if relevant) or First Party Response to Third Party Appeals (if relevant).
- Co-ordination of a unified response on all relevant planning conditions in the event of grant of planning permission issuing from the local authority which requires compliance and further negotiations with the local authority.
- Carry out whole life cost assessments as required in consultation with the Quantity Surveyor.
- Contribute to the risk management strategy and risk register.
- Assist DTL in the preparation of a detailed coordinated design programme for this stage.
- Advise on the need for any Specialists and associated cost factors.

- Coordinate the provision of necessary information to the DTL / Quantity Surveyor for the developed cost plan report.
- Advise upon, procure, and oversee all necessary surveys, on site measures & mitigations including statutory license applications. Provide timely advice on timelines to the DTL and CA.
- Produce comprehensive input to the works requirements documents, including all associated detailed design drawings and specifications for the works.
- Assist in preparation of Stage 2 reports for CA review

4.8 Traffic & Transport Services

- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in occupancy.
- Advise on the need for any Specialists and associated cost factors.
- Advise on the need for any Specialist contractors and associated cost factors, carry out and/ or coordinate detailed design for Specialist works.
- Coordinate the provision of necessary information to the DTL / Quantity Surveyor for the developed cost plan report.
- Produce comprehensive input to the works requirements documents, including all associated detailed design drawings and specifications for the works.
- Contribute to cost plan and pre-tender cost estimate for the project and assessment against the agreed budget with DTL & the Quantity Surveyor.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Assist in preparation of Stage 2 reports for CA review

4.9 Archaeology Consultancy Services

- Contribute to the Scheme Design and general design Specification in accordance with the Project Brief.
- Carry-out on-site mitigation and monitoring, if required, as required, and formulate report upon completion, Includes all statutory license applications
- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
 - Revise as necessary the Archaeological documentation following a review with the DTL and the CA and submit revisions for approval.
- Carry out examination and preparation of alternative design solutions, adjustments and design revisions as required to meet the Project Brief and Budget.
- Provide information to the Quantity Surveyor and other Consultants to enable quantification for preparation of cost estimates and Cost Plan.
- Assist the ALDT in the assessment and compliance with the conditions of final grant of planning permission, to include all associated technical reports as required.
- Assist the ALDT with responding, if required, to Additional / Further Information requests, planning appeal process if applicable.

- Assist in the preparation of a procurement strategy for the project with the DTL.
- Input to works requirements documents, all coordinated detailed design drawings and specifications for the works.
- Assist in preparation of Stage 2 reports for CA review

4.10 Assigned Certifier

- Prepare a preliminary inspection plan for issue with the tender documents.
- Prepare a Compliance Appraisal Record spread sheet that will identify the Certifier/Inspection Interface between Designers and the various parts of the Building Regulations as scheduled in the Code of Practice. This document should clearly identify the roles and responsibilities for certification, ancillary certification and submission at commencement notice stage

4.11 Design and Ancillary Certifier(s)

- Engage with the Assigned Certifier to develop the Compliance Appraisal Record.
- Prepare a risk assessment of specific elements to be identified in the Preliminary Inspection Plan and a compliance document for inclusion with the Tender Documents demonstrating that all aspects of the Building Regulations to which an Ancillary Certificate relates have been considered. The appraisal will serve as a preliminary assessment of compliance with the Building Regulations and will be coordinated with other Ancillary Certifier members of the Design Team by the Design Certifier

5 Stage 3 – Tender Action, Evaluation, Award

5.1 Architectural Services

- Act as DTL.
- Carry out all necessary actions leading to award of contracts.
- Prepare tender documents for main works and specialist works where appropriate
- Assess and advise on any requirements for site monitoring.
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary. Include specialist design team members as appropriate for qualitative assessment of specialist areas e.g. sustainable design
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Prepare Stage 3 report.

5.2 Mechanical & Electrical Engineering Services

- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Prepare tender documents for specialist(s) where appropriate.
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.3 Quantity Surveying Services

- Liaise with the LDA, PM and key members of the ALDT to define the technical evaluation criteria and award of marks.
- In conjunction with the LDA's advisers:
 - Advise on the use and/or amendment of the standard forms of building contract and contribute to drafting of particular client requirements
 - Confirm general insurance responsibilities for the Project and comment on the commercial impact,
 - Advise on bonds for performance and other purposes,

- Advise on the need for collateral warranties.
- Attend Tender Documents Review meeting with the Client to finalise the draft tender documents.
 - Finalise draft tender documents, incorporating any amendments identified at the Tender Documents Review meeting.
 - Review final draft tender documents prior to ITT issue. Assist and chair if necessary a tender document page turn workshop with the Design Team to ensure no gaps or deficiencies in design and tender documents.
 - Take instruction from the Employer prior to going to tender.
 - Provide documents in hard copy for the CA, if required.
- Tender:
 - Review and prepare draft responses to all PQQ queries received from potential candidates. Liaise with project team members, the LDA and key stakeholders to seek input where required.
 - Assist and provide input to any clarifications to be raised with potential candidates.
 - Review and comment on the pre-qualification submission and advise on shortlisting prospective tenderers as required.
 - Support the LDA project team, including procurement team in issuing the tender to the market.
 - Attend interviews with selected tenderers.
 - Check tender submissions for accuracy, level of pricing, pricing policy etc.
 - Advise on errors and qualifications in the tenders and, if necessary, negotiate thereon.
 - Prepare a draft Commercial Report on Tenders and Cost Report (format to be agreed with the Client) that includes:
 - detailed analysis, with accompanying commentary and opinion, of the costs submitted by tenderers.
 - details in respect of each cost headings including: Capex, FM Costs, and Lifecycle Costs (where applicable).
 - Professional report – executive summary, background, exclusions etc.
 - Review financial budget in view of tenders received and prepare updated Development Budget and revised cash flow.
 - Identify post tender Value Engineering opportunities.
 - Allow for Client review and incorporating Client feedback in respect of the Tender Technical Cost Report.
 - Chair a Tender Review meeting with the Client to review the draft Commercial Report on Tenders and Cost Report.
 - Finalise Commercial Report on Tenders and Cost Report, incorporating any amendments identified at the Tender Cost meeting and issue to Client.
- Attend pre-contract meetings with preferred tenderers to review any items the Contractor may be required to provide prior to contract signing. Review proposed programme for the Works and negotiate on behalf of the CA as required.
- Advise on any matters relevant to recommendation and appointment of the Contractor.
- Prepare any additional information necessary for the information of the Contractor to enable them to carry out the Works. This may include updates on Pricing Documents due to queries during tender process.
- Take instruction from the Employer regarding the award of the tenders.
- Draft letters for issue to unsuccessful tenders if required.

- Provide the Architect/ER/ Employer with the required documentation for contract signing, when requested.
- Coordinate and advise on any matters relevant to recommendation and appointment of the Contractor, including identification of possible cost savings required to maintain the Employer's budget.
- Preparing any additional information necessary for the information of the Contractors to enable him to carry out the Works. This may include updates on Pricing Documents due to queries during tender process.

5.4 Civil & Structural Engineering Services

- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Prepare tender documents for specialist(s) where appropriate.
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.5 Landscape Architectural Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013.
- Confirm compliance with PSDP duties in respect of this stage,
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Input to evaluation of contractors in relation to Health & Safety and site-specific design risks, risk assessments, construction methods statements, programme, etc.
- Evaluate the submissions received from contractors with respect to PSCS capacity & capabilities
- Review successful contractor's H&S plan to form part of the contract documentation
- Ensure appointment made in respect of Project Supervisor for the Construction Stage (PSCS)
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.7 Planning and Environmental Consultancy Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.8 Traffic & Transport Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.9 Archaeology Consultancy Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

6 Stage 4 – Construction

6.1 Architectural Services

- Act as DTL.
- Act as Employer's Representative.
- As Employer's Representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Take instructions from CA and obtain CA approvals on all occasions.
- Administer contract in a timely manner mitigating risk of future contractor claims
- Attend site to keep all relevant facts and documents in administrating claims and realistic account of actual progress and resources against contract and tender programmes
- Ensure contractor and site progress is achieved, design co-operation to avoid disputes (e.g. processing valid alternate proposals for submittals/works execution etc.)
- Support project construction and provide detailed drawings or clarification as required
- Review all contract & specialist design to ensure appropriate detailing is in place prior to construction. Attend all meetings and factory visits to ensure same.
- Update finishes board and obtain CA approval.
- Examine shop fabrication drawings prepared by the Contractor's Sub-contractor, Specialists, or suppliers for the works.
- During the construction phase the Architect must review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Design details to achieve the performance outlined in the tender requirements – Request/Approve/Reject samples/submittals/mock-ups in a timely manner.
- Ensure detailed designs/ contractor proposals/ submittals meet the sustainable design performance objectives of the brief and fulfill the criteria of the client brief & LAP and incorporating the scope of services at 1.4.2 (i) sustainability specialist(s)
- Advise in relation to application of Liquidated Damages
- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the main contractor(s) and the rest of the ALDT
- Attend and issue notes on site walks and visits (minimum weekly)
- Chair monthly CA meeting with the rest of the ALDT
- Assist in the provision of monthly progress report to CA during this phase
- Issue a Draft building commissioning report prior to handover
- Issue Quality Check Sheets and Observe and report progress addressing same
- Liaise with site monitoring staff to ensure all works are being carried out to drawing and specification
- Request and examine collateral warranties for relevant specialist works
- Provide all necessary copies of drawings and specifications for the contract documents
- Perform the duties of Design Certifier under the Building Control (Amendment) Regulations 2014 and sign the Design Certificate in accordance with those Regulations. This will include but is not limited to:
 - Provide all necessary plans, specifications and documentation required for lodgement at commencement stage in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.

- Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.
- Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Assigned Certifier's Implementation Plan.
- At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
- Provide the Design Certifier Certificates.
- Clearly define areas of responsibility for certification of compliance of the design.
- In conjunction with the Assigned Certifier review the Builder's project programme for coordination with the Preliminary Inspection Plan.
- During the construction stage clearly define the inspection methodology and undertake individual inspections in accordance with the agreed inspection plan. Provide inspection reports in a format agreed with the Assigned Certifier.
- Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role. As lead designer ensure information is provided by other disciplines as required.
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014.
- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government's "Code of Practice for Inspection and Certifying Buildings and Works" (February 2014).
- Attend meetings as required with the Assigned Certifier.
- Assess and advise on any requirements for site monitoring.
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Coordinate and chair all site meeting with the contractor and specialists on site progress
- Manage the construction phase of the project and issue all necessary instruction to the contractor
- Receive and respond to Contractors and/or Specialist's Requests for Information (RFI) providing additional design input and/or clarification where required.
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- Report to CA as required.
- Accept/Reject necessary for achievement of Substantial Completion, report to CA on same.

- Provide certification that the works have reached substantial completion.
- Provide Final Account reports to CA in accordance with the works contract.
 - Advise CA in relation to achieving occupation of all or part of the building or early handover prior to issuing Substantial Completion
 - Complete final as built accessibility and fire safety audits and confirm compliance to original plan and regulations.
 - Ensure accurate and complete as-built information including all operating manuals is provided to the CA on a timely basis.
 - Agree snag list and timing with contractor, other ALDT members and CA.
 - Provide monthly progress reports to the CA.
 - Prepare Stage 4 Building Commissioning report for each phase that reaches Practical Completion.

Note the person identified as the Employers Representative (ER) will be required to attend all site meeting and site walks. Note all instructions are to be issued in writing through the ER.

6.2 Mechanical & Electrical Engineering Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the contractor(s) and rest of the ALDT
- Attend monthly CA meeting with the rest of the ALDT
- If required, carry out all necessary supervision of the works for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Review contractor and sub-contractor submittals as required to determine approvals or rejection of same.
- Give all necessary advice in a timely manner to the Employers Representative pertaining to services works being carried out to allow the orderly running of the contract
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014.

This will include but is not limited to:

- Provide all necessary plans, specifications and documentation required for submission in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.
- Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
- Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.
- Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Design Certifier and Assigned Certifier's Implementation Plan.

- At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
- Provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier.
- Clearly define their area of responsibility for certification of compliance of the design.
- As completion or phased completion approaches on the building, the Ancillary Certifier will witness such tests as required under their remit for demonstrating compliance with the relevant parts of the Building Regulations. The Ancillary Certifier will provide updated documentation if the building as completed is at variance with the documentation submitted at Commencement Notice Stage.
- Provide Ancillary Certificate(s) for design changes after Commencement.
- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government's "Code of Practice for Inspection and Certifying Buildings and Works" (February 2014).
- Attend all site meetings, site walks and visits
- Assist in the preparation of a Draft Building commissioning Report prior to Hand-over.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- On request from the Employer's Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Report to Employers Representative as required

The person identified as the lead/senior project Mechanical and Electrical Consultant will be required to attend all site meetings and walks. The Mechanical and Electrical Consultant may not issue instructions to the contractor. All Instructions must be issued in writing by the Employers Representative.

6.3 Quantity Surveying Services

- Provide cost advice to the Client on an as requested basis in relation to contract variations.
- Complete value engineering assessments / cost comparisons of various elements as required, e.g. external wall options, first floor joist construction, internal partitions versus blockwork walls etc. frame, elevation etc.
- Monitor design changes and provide updated information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.
- Attend regular meetings with the Contractor and the design team to review progress and cost control and quality of works.
- Provide Inspection Services on a regular basis for Interim Payments, Cost Reports, and monitoring.
- Check materials stored off site as required, and ensure compliance with contract conditions for payment.
 - Prepare recommendations for interim payments to contractors, sub-contractors, and suppliers in accordance with building contract requirements.
 - Attend regular meetings with the client with regard to progress and costs and prepare interim reports on same as required.
 - Prepare monthly Cost Reports (in LDA standard format if required) including, at a minimum, updated Cash Flow Expenditure, forecast final cost, variation log, programme contingency usage, commercial risks review and update, paid to date, breakdown of costs per tenure and phase or section and executive summary.
- Provide updates to Standardized LDA Typology assessment periodically based on current live cost data, as required.
 - Attend monthly cost review meetings with the CA. Issue minutes of these meetings when chaired by the QS.
 - Attend, for the duration of the construction of the Works, the relevant site meetings in order to monitor that the Works are being executed generally in accordance with the contract and instructions given to the Contractor.
 - Attend such additional site visits as are necessary to ensure that certain stages of the works are completed in compliance Contractors claims.
- Attend sufficient regular meetings as required with the Contractor and the design team to review progress and properly administer and deliver a quality project within the required time and within budget.
- Monitor, measure, negotiate and report on all Post Contract variations and/or Client instructed scheme amendments.
 - Manage of all contractor claims, variations, and extras up to the time they are referred to dispute procedures under the contract by either party.
 - Assist the Architect/ER in assessing (preparing reports as required) Change Orders, Extension of Time Request etc as they arise.
- Prepare valuations for partial hand-over as required.
- Assist in adjudicating on any dispute or difference relating to the works which may arise between the Employer and the Contractor. The scope of this engagement shall not extend to advising the Employer following the taking of any step in or towards any arbitration or litigation in connection with the Works.

6.4 Civil & Structural Engineering Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the contractor(s) and rest of the ALDT
- Attend monthly CA meeting with the rest of the ALDT
- If required, carry out all necessary supervision of the works for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Examine and report on any variations and claims, including those resulting from delay / disruption, pertaining to Civil and Structural works being carried out to allow the orderly running of the contract
- Review contractor and sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Assist in the preparation of a Draft Building commissioning Report prior to Hand-over.
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014.

This will include but is not limited to:

- Provide all necessary plans, specifications and documentation required for submission in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.
- Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
- Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.
- Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Design Certifier and Assigned Certifier's Implementation Plan.
- At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
- Provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier.
- Clearly define their area of responsibility for certification of compliance of the design.
- As completion or phased completion approaches on the building, the Ancillary Certifier will witness such tests as required under their remit for demonstrating compliance with the relevant parts of the Building Regulations. The Ancillary Certifier will provide updated documentation if the building as completed is at variance with the documentation submitted at Commencement Notice Stage.
- Provide Ancillary Certificate(s) for design changes after Commencement.

- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government's "Code of Practice for Inspection and Certifying Buildings and Works" (February 2014).
- Attend all site meetings, site walks and visits
- Receive and respond to Contractors and/or Specialist's Requests for Information (RFI) providing additional design input and/or clarification where required
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- On request from the Employer's Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents
 - Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
 - Report to Employers Representative as required

The person identified as the lead/senior project Civil/Structural Engineer will be required to attend all site meetings and walks. The Civil/Structural Engineer may not issue instructions to the contractor. All Instructions must be issued in writing by the Employers Representative.

6.5 Landscape Architectural Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend site meetings with the contractor the rest of the ALDT as necessary
- Attend CA meeting with the rest of the ALDT as necessary
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- If required, carry out all necessary supervision of the works (Landscaping) for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014 if / as required.
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- On request from the Employer's Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents
- Report to Employers Representative as required

The person identified as the lead/senior project Civil/Structural Engineer will be required to attend all site meetings and walks. The Civil/Structural Engineer may not issue instructions to the contractor. All Instructions must be issued by the Employers Representative.

6.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013.
- Advise and provide all necessary clarification and document to the ALDT to allow the timely progression of construction
- Carry out monthly site inspection of the construction works and issue a report of all finding/observation and concerns
- Monitor the performance of the PSCS and report any findings to the CA.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.

6.7 Planning and Environmental Consultancy Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.8 Traffic & Transport Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.9 Archaeology Consultancy Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.10 Assigned Certifier

- As part of the Inspection plan, and before the commencement of work on site, agree with The Employer and the Contractor an Inspection Notification Framework (INF), taking account of the building works involved and other factors.
- Before signing the form of Undertaking by the Assigned Certifier, exercise reasonable skill, care and diligence in checking that the documentation is appropriate for lodgement with the Commencement Notice.
- Schedule and obtain Ancillary Certificates from others. Coordinate, compile, and schedule relevant information to be submitted to the Building Control Authority as required under the regulations.
- In consultation with the members of the design team, plan and oversee the implementation of the Inspection Plan during Construction. On completion provide the Inspection Plan as implemented.
- Develop and agree wording of all certificates required.
- Co-ordinate and collate all certification of compliance (sub-certificates, ancillary certificates, warranties and tests as set out in the Inspection Plan) including for completion in conjunction with the Builder.
- On termination or relinquishment of appointment make available to the Building Owner all certification prepared and inspection reports carried out.
- Act as the single point of contact with the Building Control Authority during construction, including responding to requests for additional information by the Building Control Authority.
- Seek advice from the Building Control Authority, in respect of compliance matters relating to the building or works where disputes or differences of opinion arise between the parties to the project.
- Coordinate the inspection of the works by themselves and others and to certify the works on completion. Maintain records of inspection.

7 Stage 5 – Handover and Defects Period

7.1 Architectural Services

- Act as DTL
- Oversee snagging process as required, confirm progress to CA on ongoing basis.
- Obtain as-built drawings, specifications, and other relevant information as may be required by the CA from the contractor for review by design team and specialists. Review and if acceptable transfer full documentation package to CA in electronic format including as built Architectural, M&E, Civil/Structural and Specialist drawings (else pursue contractor for required revisions/updates).
- Ensure that the contractor provides sufficient information – including but not limited to as built drawings, specifications, test reports (e.g. air tightness tests, thermal imaging etc), EPD's, construction product information, and 3rd party certifications – to demonstrate that the sustainable design performance objectives of the brief have been met.
- Oversee and monitor completion of all post Practical Completion landscaping activities and services.
- Pass on relevant recommendations for the ongoing maintenance and care.
- As Employers Representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Determine any extensions of time under the contract.
- Arrange handover procedure, including final as built drawing issued to the contractor at the construction stage
- Arrange handover of the individual system and manufacturers' manuals and advise on maintenance contracts to enable the CA to operate and maintain the works
- Monitor agreement of the final account and issue report to the CA.
- Ensure snags or other defects which require urgent / immediate attention during the defects period are acted upon and closed-out.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- One month before the end of the defects periods as set out in the construction contracts(s), inspect the site and compile a list of defects in the works and issue a schedule of defects/snags to the CA for review if required, and issue to the Contractor.
- Liaise with contractor for close out all outstanding claims under contract
- Coordinate inspection at the end of the defects period
- Make recommendation on further retention of monies
- Prepare final report for issue to CA including lessons learnt
- Ensure accurate and complete as-built information including all operating manuals is provided to the CA on a timely basis.
- Administer retention period post Practical Completion including
 - Undertake final snagging of projects and close out of same to release final retention
 - Liaise with specialist as necessary to resolve issues

7.2 Mechanical & Electrical Engineering Services

- In conjunction with Employer's Representative, oversee the snagging process as required.

- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.3 Quantity Surveying Services

- Negotiate and agree Main Contract Final Accounts including all Contractor claims, variations and extras instructed by the Design team.
- Provide final information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.
- Liaison with Design Team and Client on Post Contract Issues.
- Produce a full Final Account Report for the CA, broken down into tenures and phases / sections. Including final LDA Standardized Typology assessment based on out-turn costs.
- Provide feedback to the LDA including lessons learned capturing areas of processes / procedures / documentation that could be improved to assist the LDA in maximizing value and minimizing risk going forward.
- Make available relevant, key personnel to the CA in the event of the Controller Auditor General and/or the Public Accounts Committee or other publicly appointed body wishing to discuss the public sector aspects of the procurement.
- Liaise with Contractor and client at the end of the defects liability period to ensure that Final Account / Final Statement is agreed. It is envisaged that the defects liability period will be 15 months.
- Conduct a design review, including Analysis of Outturn Cost and operation risk review, for submission to Employer.

7.4 Civil & Structural Engineering Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.5 Landscape Architectural Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, notwithstanding any inconsistent Contract contents.
- Liaise with DTL, ALDT members and the contractor in relation to the provision of the Safety File to include Health & Safety risk assessments, Operation & Maintenance files (O&Ms), as-built drawings, detailed technical specifications, Specialist works as-built drawings and specifications, all results of specialist's test or any other tests carried out during the course of the project, Maintenance Specifications or other relevant documentation.
- The Safety File should include all relevant information to enable the building to be occupied and maintained safely and future changes to be made with full knowledge of the hazards and risks. Where appropriate it should incorporate details of the building, or the mechanical and electrical services systems, manufacturers' operational instructions, supplier references, checklists, test certificates and other maintenance details.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- The Employer's Representative should check with the PSDP before issuing the Substantial Completion Certificate. All substantive elements (sufficient to allow safe occupation of the building) of the Safety File should be complete before Substantial Completion, and any supplementary information must be in place within three months of that date.
- Where substantive elements of the Safety File are incomplete due to the failure of the Contractor or Project Supervisor (Construction Stage) to cooperate or provide the requisite information, the PSDP should so advise the Employer's Representative who should not issue Substantial Completion until the relevant information is provided.

7.7 Planning and Environmental Consultancy Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.8 Assigned Certifier

- At completion stage, submit the following to the Building Control Authority:
 - Certificate of Compliance on Completion signed by the Builder (at Part A) and by the Assigned Certifier (at Part B)
 - Plans, calculations, specifications and, showing how the completed building has achieved compliance with the Building Regulations must be lodged on the Building Control Management System when the Certificate of Compliance on Completion is submitted or at an earlier date. Where design documents have changed or supersede design documents previously lodged with the Building Control Authority with the Commencement Notice or later, any such difference should be clearly identified
 - The Inspection Plan as implemented by the Assigned Certifier in accordance with this Code of Practice.

7.9 Multi-Disciplinary Services on Handover

7.9.1 Final Account Report

- After receipt of the Final Statement the Final Account must be agreed and the Employer's Representative shall issue to the Client a Final Account Report including a Quantity Surveyor's Report. Timelines for this activity are to be agreed on a project by project basis.
- The ALDT, PM and QS recommendation for payment of the adjusted Contract Sum must be detailed in this report with the following appendices:
 - The summary section only of the Draft Final Account.
 - Quantity Surveyor's Final Account Report.
 - Written Confirmation from the Project Supervisor Design Process and the Client that the completed Safety File has been handed over to the Client.
 - A copy of the Architect's Opinions on Compliance of the Works with Planning and Development Acts and with the Building Regulations.
 - Copies of all guarantees provided for in the Contract Documents.

7.9.2 Defects Period

- On completion of the Defects Period, the IDT must agree and confirm in writing to the Client that the work is complete, and all defects have been corrected within this period.
- The final certificate can now be issued.
- Phasing may be required subject to the project programme.

7.9.3 Final Account Report Supplement

The ALDT must submit a Final Project Report to the Client on completion of the Defects Period, subject to agreement with the client that all defects have been addressed. This report should include the following Supplement to the Final Account Report:

- The summary section only of the agreed Final Account.
- Written confirmation of both Client and IDT that the work is complete, and all defects have been corrected within the Defects Period.

- The Architect's Report on the Building Works and the Contractor's performance during the Building Contract.
- Civil/Structural Engineer's Report on the civil/structural works and the quality of the work.
- Building Services Engineer's Report on the Mechanical and Electrical Services, and the quality of the Mechanical and Electrical installation

8 General Services for All Stages

8.1 Fire Safety Engineering

- Fire Safety Engineering design services are included in the Design Team for all stages of the project.
- Design Stages:
 - Provide general advice on the need to obtain a Fire Safety Certificate, comply with Building Regulations and with other statutory requirements
 - Provide enough preliminary information in relation to the project in the form of advice, sketch drawings, schematic layouts, reports or outline specifications to enable the lead designer to prepare outline proposals, concept proposals, developed design proposals and detailed design proposals
 - Obtain from and discuss with our other consultants' proposals, designs and outline specifications as to architectural, civil and structural, mechanical and electrical elements and requirements and co-ordinate these requirements with the fire safety engineering solution.
 - In conjunction with our other consultants, assist the architect in the preparation of a Preliminary Design Report and Cost Plan in respect of the final scheme design, illustrating the scheme in scale plans, sections and elevations and specifications in sufficient detail to enable The Client to approve spatial arrangements, materials and appearance, and reporting as to all the above issues required to be dealt with under this work stage.
 - Formally confirm that the architectural drawings are compliant with the fire safety regulations and with your advice and that a fire safety certificate can be obtained based on the architectural layouts.
 - Review the Architectural Design at each design iteration and confirm that the fire safety engineering requirements are incorporated
 - Review the M&E Design at each design iteration and confirm that the fire safety engineering requirements are incorporated in the design document.
 - Review the Civil and Structural Design at each design iteration and confirm that the fire safety engineering requirements are incorporated in the design document.
 - Review of the design proposals and advising on any necessary changes vis-à-vis the achievement of compliance with relevant requirements of Part B (Fire) of the Second Schedule to the Building Regulations.
 - Advising the Architects and other members of the design team on the information required for inclusion with the Fire Safety Certificate Application/Report if required as part of the project.
 - Preparation of fire engineering analysis for those aspects of the design which deviate from the recommendations in the guidance documents.
 - Advise the Design Team of a Fire Strategy dealing with any fire safety engineering aspects of the design, exploring alternative solutions and identifying any possible alternative

- options. This will include fire engineering analysis and modelling of maximum compartment size, fire growth, smoke movement and occupant response.
- Advise the Design Team on detailed design and specification of all items arising from the fire safety requirements of the project. These include, but are not limited to doors, wall construction, ceiling construction, floor coverings, service routes, ducts, alarms, smoke and heat detectors and suitability of building materials generally where they are material to fire safety aspects of the project.
 - Advise the Design Team of specific functions and/or elements of accommodation within the design which affect fire safety e.g. storage of waste, gases, fuels, location of vents, effect of deliveries.
 - Commission Computational Fluid Dynamic studies where required to prove the design proposal.
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Existing means of escape and required alterations – location, number, size, specification of stair cores and access/egress points; travel distances; protected escape routes; phasing proposals.
 - Construction – fire resistance of new structure, compartmentation.
 - Elevations – distance to relevant boundaries and requirements for fire rating elevations if required.
 - Existing Fire Fighting Facilities and required alterations to these– means of fighting fire and the need for hydrants around the site, firefighting access roadways, internal fire mains, testing, maintenance and storage of equipment etc.
 - Active Fire Safety Systems – requirements for smoke control requirements such as venting, emergency lighting, fire detection and alarm etc.
 - Site wide fire safety issues relating to the interaction of the building with other areas of the site.
 - Examining and investigating options for alternative uses within fire strategy.
 - Investigating multi occupancy layouts and use of building in relation to fire strategy.
 - Fire Certificate application and associated process:
 - Consult as necessary with Building Control authorities, the Fire Brigade and statutory undertakers about any matters of principal in connection with the design of the project.
 - Preparation of Fire Safety Certificate Compliance Reports for the building including relevant drawings for submission for an application for a Fire Safety Certificate and other relevant support information, demonstrating compliance with the relevant requirements of Part B (Fire) of the Building Regulations.
 - Consultations / negotiations as necessary with the Building Control Authority during the course of their consideration of the Fire Safety Applications.
 - Duly respond to all requests from the local authority for additional information during the planning application process.

- Produce amended drawings, analysis, modelling and reports in response to RFI, clarifications/modifications, and appeal(s) as required.
 - Preparation of additional information as may be required by the Local Authority Fire Department, including further fire engineering analysis and computer modelling as necessary.
 - Making the applications for Fire Safety Certificates to the relevant local authorities.
 - Produce amended drawings in response to oral hearing information and further information on queries and clarifications if required. Attendance at legal briefings, design team meetings, oral hearing, and preparation of witness statement and any related services.
 - Tender Document
 - Arrange for a detailed review with the Architect and the Client of the Fire Safety Engineering drawings and specifications, and formally confirm that they have been prepared in accordance with the agreed brief and that they are consistent with the architectural drawings.
 - Revise as necessary the Fire Safety Engineering documentation following the above detailed review with the Architect and the Client and submit revisions for Client/ Project Manager Approval.
- Construction
 - The Consultant shall provide further information as is reasonably necessary, in his opinion, to enable contractors and/or sub-contractors to prepare installation drawings.
 - The Fire Safety Engineering designer shall examine installation drawings, shop drawings and builders work details submitted by contractors and/or sub-contractors for the fire safety works or parts thereof to ensure compliance with building regulations, standards and the fire safety certification documentation.
 - The Fire Safety Engineering designer shall advise The Client through the lead consultant on the need for special inspections or tests arising during the construction of the Works.
 - The Consultant shall assist the rest of the professional team in examining Contractors' and/or Sub-contractors' proposals as may be required by contracts for the Works.
 - Assist in providing a response from the design team and advise on the effects of a proposed change to the design of the project, in accordance with the change control procedures.
 - The Fire Safety Engineering designer shall examine the proposals of Contractors or Sub-Contractors for carrying out commissioning procedures and performance testing in relation to the fire safety works. Comment to The Client on any requirements of these proposals affecting the programme for the Works
 - Provide information to, discuss proposals with and co-ordinate your production information with the input of our other consultants and of any relevant specialists.
 - The Fire Safety Engineering designer shall examine the results of commissioning and the documentary records. Inspect the Works on completion and, in conjunction with the professional team, record any defects. Obtain from the Contractor all test and commissioning reports required to verify the correct operation of the systems involved, having witnessed commissioning test where appropriate and commissioning reports and confirm that this work has been completed satisfactorily. Review and approve the certificates for design, installation and commissioning / completion, furnished by others,

- in respect of all fire safety elements e.g. fire stopping, structural fire protection, fire door sets, life safety systems (fire detection and alarm, PA, CCTV, smoke control system etc.).
- Inspect the site as required in the Inspection Plan and issue the corresponding inspection reports recording progress, quality and cost. Monitor that defects identified are being corrected by the contractor.
 - Where necessary advise on the need for any additional inspections and/or tests required. Where appropriate propose recommended suppliers, provide brief and obtain costs for the provision of such additional tests.
 - As appropriate make recommendations for sample-taking and the carrying out of tests of materials and workmanship and examine the conduct and results of such tests whether on or off-site.
 - As appropriate make recommendations for the opening up of work to determine that it is generally in accordance with the Building Contract.
 - Carry out regular visits to the works for the purpose of supervision, monitoring and inspection, to confirm that the fire safety works are being carried out in accordance with the Contract
 - In conjunction with the other consultants, review and comment on Contractors, sub-contractors or Specialists' proposals and programmes for commissioning and performance testing of the works. Where required, witness commissioning and testing.
 - Carry out inspection of the fire safety engineering works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Contract Administrator and Project Manager of all snags and defects identified for issue to the Contractor. Carry out inspection of the remedial works upon notification of their completion by the Contractor.
 - If reasonably requested to do so, inspect materials delivered to Site.
 - If reasonably requested to do so, visit the sites of fabrication and assembly of structural elements to inspect such materials and workmanship before delivery to the Site.
 - Assist in evaluation of any outstanding works still to be completed prior to confirmation of Practical Completion.
 - On request from the Contract Administrator, provide certification that the fire safety engineering works have reached Practical Completion.
 - Preparation & submission of an Opinion of Compliance with the relevant requirements of Part B (Fire) of the Building Regulations.
 - Provide Ancillary Certifier's Certificates on completion to the assigned certifier and the client.
- Handover, Close out and post occupancy Services:
 - Inspect the Works and prepare a snagging report in the period leading up to practical completion of the Works and/or any section thereof under the Building Contract. Confirm to The Client in writing whether any significant items of work exist which may prevent the Works or any such section thereof from satisfying the requirements of practical completion under the Building Contract.
 - Development and control of Fire Safety Management files for premises
 - Development of Fire Safety Management procedures for the premises.
 - Contribute to the timely completion of the 'punch list' items on the project.
 - Attend and contribute to post project evaluation.

- Provide advice and recommendations to the Client in relation to Building Maintenance as it relates to fire safety elements, and the training of the managers and maintenance staff who will be responsible for the operation, safety and maintenance of the new facility. Participate in training and maintenance seminar.
- Provide services required in connection with the Defects Liability Period under the Building Contract and the making good of defects. After Practical Completion and before the end of the defects' liability period, visit site with the Architect/Client to check operation of installations and advise regarding the correction of any operational difficulties that may exist. Issue report on this visit to all parties.
- In conjunction with Other Consultants, monitor the Project Defects Liability Period. Compile a list of defects of work, one month before the end of the Defects Liability Period and issue coordinated Project Team's defects list to the contractor. During Defects Liability Period instruct the Contractor on any urgent defects that require immediate attention.

8.2 Disability Access Engineering

- Disability Access Engineering design services are included in the Design Team for all stages of the project.
- Design Stages:
 - Provide general advice on the need to obtain a Disability Access Certificate, comply with Building Regulations and with other statutory requirements.
 - Advise on the implementation of universal design standards.
 - Provide enough preliminary information in relation to the project in the form of advice, sketch drawings, schematic layouts, reports or outline specifications to enable the lead designer to prepare outline proposals, concept proposals, developed design proposals and detailed design proposals
 - Obtain from and discuss with our other consultants' proposals, designs and outline specifications as to architectural, civil and structural, mechanical and electrical elements and requirements and co-ordinate these requirements with the disability access engineering solution.
 - In conjunction with our other consultants, assist the architect in the preparation of a Preliminary Design Report and Cost Plan in respect of the final scheme design, illustrating the scheme in scale plans, sections and elevations and specifications in sufficient detail to enable The Client to approve spatial arrangements, materials and appearance, and reporting as to all the above issues required to be dealt with under this work stage.
 - Formally confirm that the architectural drawings are compliant with the disability access regulations and with your advice and that a disability access certificate can be obtained based on the architectural layouts.
 - Review the Architectural Design at each design iteration and confirm that the disability access engineering requirements are incorporated. Advise on potential design improvements aligned universal design requirements.
 - Review the M&E Design at each design iteration and confirm that the disability access engineering requirements are incorporated in the design document.
 - Review the Civil and Structural Design at each design iteration and confirm that the disability access engineering requirements are incorporated in the design document.

- Review of the design proposals and advising on any necessary changes vis-à-vis the achievement of compliance with relevant requirements of Part M, Part K and all relevant parts of the Second Schedule to the Building Regulations.
- Advising the Architects and other members of the design team on the information required for inclusion with the Disability Access Certificate Application/Report if required as part of the project.
- Preparation of disability access engineering analysis for those aspects of the design which deviate from the recommendations in the guidance documents.
- Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Existing means of escape and required alterations – location, number, size, specification of stair cores and access/egress points; travel distances; protected escape routes; phasing proposals.
- Disability Access Certificate application and associated process:
 - Consult as necessary with Building Control authorities and statutory undertakers about any matters of principal in connection with the design of the project.
 - Preparation of Disability Access Certificate Compliance Reports for the building including relevant drawings for submission for an application for a Disability Access Certificate and other relevant support information, demonstrating compliance with the relevant requirements of Part M and associated part of the Building Regulations.
 - Consultations / negotiations as necessary with the Building Control Authority during the course of their consideration of the Application.
 - Duly respond to all requests from the local authority for additional information during the planning application process.
 - Produce amended drawings, analysis, modelling and reports in response to RFI, clarifications/modifications, and appeal(s) as required.
 - Preparation of additional information as may be required by the Local, including further analysis as necessary.
 - Making the applications for Disability Access Certificate to the relevant local authorities.
 - Produce amended drawings in response to oral hearing information and further information on queries and clarifications if required. Attendance at legal briefings, design team meetings, oral hearing, and preparation of witness statement and any related services.
- Tender Document
 - Arrange for a detailed review with the Architect and the Client the drawings and specifications, and formally confirm that they have been prepared in accordance with the agreed brief and that they are consistent with the disability access certificate granted.
- Construction
 - The Consultant shall provide further information as is reasonably necessary, in his opinion, to enable contractors and/or sub-contractors to prepare installation drawings.

- The Disability Access Designer shall examine installation drawings, shop drawings and builders work details submitted by contractors and/or sub-contractors for the relevant works or parts thereof to ensure compliance with building regulations, standards and the disable access certification documentation.
- The Disability Access Designer shall advise The Client through the lead consultant on the need for special inspections or tests arising during the construction of the Works.
- The Consultant shall assist the rest of the professional team in examining Contractors' and/or Sub-contractors' proposals as may be required by contracts for the Works.
- Assist in providing a response from the design team and advise on the effects of a proposed change to the design of the project, in accordance with the change control procedures.
- The Disability Access Designer shall examine the proposals of Contractors or Sub-Contractors for carrying out commissioning procedures and performance testing in relation to part M and granted disabled access certificate. Comment to The Client on any requirements of these proposals affecting the programme for the Works.
- Provide information to, discuss proposals with and co-ordinate your production information with the input of our other consultants and of any relevant specialists.
- The Disability Access Designer shall examine the results of commissioning and the documentary records. Inspect the Works on completion and, in conjunction with the professional team, record any defects. Obtain from the Contractor all test and commissioning reports required to verify the correct operation of the systems involved, having witnessed commissioning test where appropriate and commissioning reports and confirm that this work has been completed satisfactorily. Review and approve the certificates for design, installation and commissioning / completion, furnished by others in respect of all disability access elements e.g. disabled refuge calling stations, automated opening devices etc.
- Inspect the site as required in the Inspection Plan and issue the corresponding inspection reports recording progress, quality and cost. Monitor that defects identified are being corrected by the contractor.
- Where necessary advise on the need for any additional inspections and/or tests required. Where appropriate propose recommended suppliers, provide brief and obtain costs for the provision of such additional tests.
- As appropriate make recommendations for sample-taking and the carrying out of tests of materials and workmanship and examine the conduct and results of such tests whether on or off-site.
- As appropriate make recommendations for the opening up of work to determine that it is generally in accordance with the Building Contract.
- Carry out regular visits to the works for the purpose of supervision, monitoring and inspection, to confirm that the relevant works are being carried out in accordance with the Contract
- In conjunction with the other consultants, review and comment on Contractors, sub-contractors or Specialists' proposals and programmes for commissioning and performance testing of the works. Where required, witness commissioning and testing.
- Carry out inspection of the relevant works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Contract Administrator and Project Manager of all snags and defects identified for issue to the Contractor. Carry

out inspection of the remedial works upon notification of their completion by the Contractor.

- If reasonably requested to do so, inspect materials delivered to Site.
- If reasonably requested to do so, visit the sites of fabrication and assembly of structural elements to inspect such materials and workmanship before delivery to the Site.
- Assist in evaluation of any outstanding works still to be completed prior to confirmation of Practical Completion.
- On request from the Contract Administrator, provide certification that the disabled access and Part M works have reached Practical Completion.
- Preparation & submission of an Opinion of Compliance with the relevant requirements of Part M (Access) of the Building Regulations.
- Provide Ancillary Certifier's Certificates on completion to the assigned certifier and the client.
- Handover, Close out and post occupancy Services:
 - Inspect the Works and prepare a snagging report in the period leading up to practical completion of the Works and/or any section thereof under the Building Contract. Confirm to The Client in writing whether any significant items of work exist which may prevent the Works or any such section thereof from satisfying the requirements of practical completion under the Building Contract.
 - Contribute to the timely completion of the 'punch list' items on the project.
 - Attend and contribute to post project evaluation.
 - After hand-over and before the end of the defect' liability period, visit site with the Architect/Client to check operation of installations and advise regarding the correction of any operational difficulties that may exist. Issue report on this visit to all parties.
 - In conjunction with Other Consultants, monitor the Project Defects Liability Period. Compile a list of defects of work, one month before the end of the Defects Liability Period and issue coordinated Project Team's defects list to the contractor. During Defects Liability Period instruct Contractor on any urgent defects, which require immediate attention.
 - At the end of the Defects Period, carry out a final defects' inspection, and on satisfactory completion of all defects, notify the Contract Administrator accordingly.

The LDA reserves the right to terminate the contract at any point throughout the process.

INVITATION TO TENDER

Establishment of a multi-party framework agreement for	Architect Led Design Team Services
Procedure	Restricted
eTenders RFT ID	176810
OJEU REF	
Issue Date	Wednesday 07th July 2021
Closing Date for Queries	Thursday 29th July 2021 at 12:00hrs
Contact for Queries	Questions and Answers facility on www.etenders.gov.ie
Closing Date / Time for receipt of Completed Tenders	Friday 06th August 2021 at 17:00hrs
<i>Please note that information relating to this Invitation to Tender, including clarifications and changes, will be published on the Irish Government Procurement Opportunities Portal (www.etenders.gov.ie). Responses to queries will be circulated to all Tenderers by email. The identity of the person making a query will not be disclosed when circulating the response. Please note that the Contracting Authority cannot accept responsibility for information relayed (or not relayed) via third parties.</i>	

TABLE OF CONTENTS

1. Disclaimer.....	5
2. Summary	5
3. About the Contracting Authority	6
3.1 The Projects	6
4. Scope of the Framework Agreement	7
4.1 Numbers Admitted to the Framework Agreement.....	8
4.2 Duration of the Framework Agreement.....	8
4.3 Estimated Value of the Framework Agreement.....	8
4.4 Awarding Contracts under the Framework Agreement	8
4.5 Review of Performance	9
4.6 Account Management.....	10
4.7 Details of Contracts Arising Over Life of Framework Agreement	10
4.8 Right to Tender outside of the Framework.....	11
4.9 Award to Runner Up for the conclusion of the Framework	11
4.10 Replacement Personnel:.....	12
4.11 Award of Project Management Contracts and Design Team Contracts to same Economic Operator	12
5. Specification of Requirements for Initial Contract under the Framework	12
5.1 The Team	12
5.2 Detailed Specification of Requirements.....	13
5.3 The Project – Cherry Orchard, Dublin.....	13
5 Award Criteria	14
APPENDIX 1 - INSTRUCTIONS TO TENDERERS	18
(a) Submission of Tenders.....	18
(b) Queries.....	18
(c) Sufficiency & Accuracy of Tender.....	19
(d) Tender Documents - Ambiguity, Discrepancy, Error, Omission.....	19
(e) Qualification of Tenders and Referential Bids	19
(f) Extension of Tender Period	19
(g) Modifications to Tenders prior to the Closing Date for Receipt of Tenders	19
(h) Form of Tender	19
(i) Cost of Preparation of Tender	20

(j)	Clarification of Tenders	20
(k)	Correction of Errors.....	20
(l)	Tender Validity Period	20
(m)	Currency and Payments.....	20
(n)	Confidentiality	21
(o)	Conflict of Interest	21
(p)	Freedom of Information Acts	21
(q)	Tax Clearance.....	21
(r)	Withholding Tax.....	22
(s)	Irish Legislation and Law.....	22
(t)	Dignity at Work	22
(u)	Interference and Inducement to Purchase	22
(v)	Notification of Tender Evaluations.....	22
(w)	Award Notices.....	23
(x)	Policy on Personal Debriefings	23
(y)	Replacement Personnel.....	23
(z)	Copyright	23
(aa)	Brand Names, etc.....	23
(bb)	Payment.....	24
(cc)	Right Not to Award.....	24
(dd)	Environmental Aspects.....	24
(ee)	Accessibility.....	24
(ff)	Knowledge and Skills Transfer.....	24
(gg)	Collusive Tendering	24
(hh)	Change in the Composition of a Tender.....	25
(ii)	Consortia and Prime Subcontractors	25
(jj)	Anti-Competitive Conduct	25
(kk)	Data Protection	25
(ll)	Publicity.....	26
	APPENDIX 2 – FORM OF TENDER.....	27
	APPENDIX 3 – RESOURCE ALLOCATION SCHEDULE.....	32
	APPENDIX 4 – FRAMEWORK AGREEMENT TERMS AND CONDITIONS	34
	APPENDIX 5 – THE CONTRACTING AUTHORITY TERMS AND CONDITIONS	35
	APPENDIX 6 – DATA PROTECTION AGREEMENT	36

APPENDIX 7 – OUTLINE BRIEF, CHERRY ORCHARD	37
APPENDIX 8 – DETAILED SCOPE OF SERVICES	38
APPENDIX 9 – PRICING AND RESOURCE BREAKDOWN	39
APPENDIX 10 – SCHEDULE OF INSURANCES & SERVICE INSURANCE QUESTIONNAIRE	40
APPENDIX 11 – KEY PERFORMANCE INDICATORS.....	41

1. Disclaimer

This document issued herewith (“the Document”) is for information only and does not constitute, and shall not be interpreted as, an offer for sale, prospectus, or the basis of a contract.

Tenderers are recommended to read the documents thoroughly. While all reasonable steps have been taken to ensure that the information set out in the Document is accurate and up to date, no representation or warranty, express or implied, is or will be made or given in relation to the accuracy or the completeness of any information contained in the Document or otherwise provided by or on behalf of the Contracting Authority (in writing or otherwise) to any interested party or its advisers. No responsibility or liability for any loss or damage arising as a result of reliance on these documents, or for the information contained in these documents or for any omission is or will be accepted by the Contracting Authority or by any of its officers, employees, agents or professional advisers. No officer, employee, agent, or professional adviser of the company has any authority to give or make any representation or warranty, express or implied, in relation to such information. The Contracting Authority’s officers, employees, agents and professional advisers expressly disclaim any and all liability arising out of such documentation or information and any errors or omissions in or from the documents and information.

The Contracting Authority reserves the right to discontinue the procurement process at any time.

2. Summary

Contracting Authority	Land Development Agency
Nature of Procurement	<i>Architect Led Design Team</i>
Type	Services
Procedure	The Contracting Authority is utilising the EU Restricted procedure of European Council Directive 2014/24/EU
Stage in procedure	This is the second stage of this competitive procedure whereby parties who have been deemed qualified on foot of their Expression of Interest may submit a Tender.
Award Criteria	As contained in Section 5 of this Document.

3. About the Contracting Authority

The Land Development Agency (LDA), established in September 2018, is a key Government land management initiative.

Its objectives are to:

- Coordinate appropriate State lands for regeneration and development, opening key sites for housing delivery.
- Driving strategic land assembly, working with both public and private sector land owners.
- Contributing towards the delivery of affordable housing; and
- Become a leading influencer of housing and land management, through research and innovation.

The LDA will be underpinned by grounding legislation and is overseen by an independent board of directors. The Government has committed to providing the LDA with equity capital of up to €1.25 billion.

3.1 The Projects

The LDA are exploring a number of projects at the following sites:

Pipeline Site	Projected Units
Dyke Road	250
Kilbarry, Cork	3,000
Bricins / Arbour Hill	400
Site 1, Cork Docks	600
Site 2, Cork Docks	400
East Wall, Dublin Port	200
Sandy Road	500
Cherryorchard	1,000
Dublin 8	750
Leinster Region, location undisclosed.	1,500
Leinster Region, location undisclosed.	800
Munster Region, location undisclosed.	200
Leinster Region, location undisclosed.	180
Leinster Region, location undisclosed.	500
Leinster Region, location undisclosed.	2,500
Total	12,780

It should be noted that this list is not exhaustive, and the LDA reserve the right to add or remove projects from this list throughout the duration of the Framework Agreement.

4. Scope of the Framework Agreement

The Contracting Authority proposes to engage in a competitive process for the establishment of a *multi-party* framework agreement for Architect Led Design Team Services.

A framework agreement constitutes a means of establishing overall terms and conditions in accordance with which, for a specified duration, individual contracts may or not be awarded. In the case of a multi-party framework agreement, contracts will be awarded in accordance with the process outlined herein.

It is emphasised that a framework agreement constitutes no guarantee to purchase a specific quantity of supplies or services from a particular economic operator. Indeed, the Contracting Authority reserves the right to operate outside of the framework agreement at its discretion, particularly should it become apparent that doing so would offer greater value for money. Notwithstanding the foregoing, the framework agreement approach has been adopted in order to leverage efficiencies and maximise cost savings over the duration of the framework

The framework will be delivered in two lots:

- Lot 1 – Architect-led design team framework for a development of projects exceeding 300 units of accommodation (or development equivalent).
- Lot 2 – Architect-led design team framework for a development of projects 300 units of accommodation and less (or development equivalent).

The Architect Led Design Team will comprise

- a) Architectural Services (incl. Design Team Leader, conservation, masterplan & urban design, fire safety design services, disability access design services, employer's representative for the Works Contract and design certifier as defined under the Building Control (Amendment) Regulations 2014).
- b) Civil & Structural Engineering Services
- c) Quantity Surveying Services
- d) Mechanical, Electrical & ICT Engineering Services
- e) Landscape Architectural Services
- f) Project Supervisor for the Design and Construction Process
- g) Planning & Environmental Consultant
- h) Traffic Management Services
- i) Archaeological Services

- j) Assigned Certifier Services (does not form part the Cherry Orchard scope of service)
- k) Other ancillary design and consultancy services as required

The architectural services consultant will be the design team lead and will act as the single point of contractual responsibility, with the remaining key disciplines providing collateral warranties for the benefit of the Contracting Authority.

4.1 Numbers Admitted to the Framework Agreement

The framework agreement will be established as a multi-party framework agreement with five (5) tenderers selected per lot following the tender stage and the application of the award criteria. Thereafter they will be considered for the award of all contracts within the scope of the framework agreement.

4.2 Duration of the Framework Agreement

The maximum duration of the framework agreement will be three [3] years subject to satisfactory annual review of performance. This may be extended for one [1] additional year.

For the avoidance of doubt, the Contracting Authority confirms that the period of any contracts awarded under the framework agreement may extend beyond the date of expiry of the agreement.

4.3 Estimated Value of the Framework Agreement

The estimated total value of purchases pursuant to the framework agreement for:

- Lot 1 is in the region of €50m (ex. VAT) over the lifetime of the agreement.
- Lot 2 is in the region of €25m (ex VAT) over the lifetime of the agreement.

It is emphasised, however, that this figure is provided strictly for indicative purposes only as there is no guaranteed expenditure under the framework agreement.

4.4 Awarding Contracts under the Framework Agreement

Individual contracts may be awarded as follows:

(a) A mini-tender competition will be conducted with all firms admitted to the framework agreement for the relevant lot, depending on project size. On each occasion a Request for Tender will be issued detailing the scope of requirements, the award criteria and a closing date and time. As previously noted firms can only be admitted to one lot of the framework and will only be invited to tender for projects within that lot.

(b) In circumstances where a mini tender competition is run between the members of the Framework as described above, and a competition is not successfully concluded, for example, where no tenders are received, or the tenders received are not capable of acceptance for any reason, the Contracting Authority reserves the

right to consult any member of the Framework regarding proposals for performing the required Services and to directly award the required Services to such member where this is the most expedient way to proceed, taking into account any relevant considerations.

(c) In circumstances where any Services required by the Contracting Authority under this Agreement comprise (a) the repetition of similar Services (i.e. that is services relating to the same project) previously performed for the Contracting Authority by a member of the Framework, or (b) an amendment or termination of arrangements in respect of which a member of the Framework previously advised or provided Services, the Contracting Authority reserves the right to directly award the required Services to such member where this is the most expedient way to proceed, taking into account any relevant considerations such as the need to ensure continuity of the services and affordability.

(d) The Contracting Authority reserves the right to directly award Services to any member of the Framework, within the relevant lot, if it considers it necessary to do so in respect of particular matters, having regard to timing, availability and expertise of resources, conflicts of interest and such other criteria as it considers relevant to such matters.

(e) The Contracting Authority may, from time to time, obtain specific specialist services, up to a value of €25,000, that are covered by this Framework directly from one of the firms admitted to the framework agreement in accordance with Recital 61 of Directive 2014/24/EU.

(f) Within each separate Lot there will also be an allowance for a cascading (rotational) framework for work up to a value of €50,000. This work may include but is not limited to due diligence, feasibility studies, site assessment, block planning for site evaluation purposes etc. This will be a five party rotational arrangement with all framework members with the first appointment to go to the top ranked member, second appointment to the second placed and so on to the fifth ranked. Candidates on the panel who are consistently unable to undertake the works or fail on the pre-set KPI targets may be removed from the panel.

(g) The Contracting Authority reserves the right to amalgamate sites to form a single project for mini-tender competition where efficiencies can be gained and this is deemed advantageous to the LDA, for example, due to scope, programme, location etc.

4.5 Review of Performance

To ensure services are provided to a continuously high standard by the framework members, bi-annual performance reviews will be carried out with each framework member. The main criteria for measuring performance will be as listed below and as

detailed in the Framework Agreement. It is expected that the successful tenderer(s) will take a proactive role in monitoring performance with a view to making appropriate recommendations where necessary for continuous improvement.

- Understanding of Client brief
- Design process and quality
- Communication and responsiveness
- Agreed programme delivery
- Budget and risk management
- Fee competitiveness and completeness
- Innovation & Sustainability

4.6 Account Management

The Contracting Authority requires tenderers to nominate a dedicated account manager who will act as the main point of contact for the duration of the contract. This person shall have the authority to deal with all matters in relation to the contract and be responsible for the satisfactory delivery of the services required. The duties of the account manager will include the following:

- Overall responsibility for a good working relationship with the Contracting Authority;
- Meet as and when required to review the relationship and examine performance;
- Deal with disputes, complaints or concerns that cannot be adequately resolved;
- Regularly give and receive both formal and informal feedback on the relationship, workloads, processes, areas and suggestions for improvement and cost savings;
- Proactively discuss with the Contracting Authority ways of improving efficiency regarding service delivery in general.

NOTE: Tenderers will note that account management activities will be non-billable (i.e. the Contracting Authority will not pay separately for account management activities). The Contracting Authority will nominate authorised staff to liaise with the successful Framework Member[s] and delegate as required.

4.7 Details of Contracts Arising Over Life of Framework Agreement

In addition to the initial contract, the framework agreement may also be used for the other projects under LDA's remit and any other projects that may be assigned to LDA over the duration of the Framework.

The anticipated projects include;

Pipeline Site	Projected Units
Dyke Road	250
Kilbarry, Cork	3,000
Bricins / Arbour Hill	400
Site 1, Cork Docks	600
Site 2, Cork Docks	400
East Wall, Dublin Port	200
Sandy Road	500
Cherryorchard	1,000
Dublin 8	750
Leinster Region, location undisclosed.	1,500
Leinster Region, location undisclosed.	800
Munster Region, location undisclosed.	200
Leinster Region, location undisclosed.	180
Leinster Region, location undisclosed.	500
Leinster Region, location undisclosed.	2,500
Total	12,780

It should be noted that there is no guarantee that the projects as listed above will proceed, and the LDA reserve the right to add or amend the list as appropriate depending the projects assigned to it.

4.8 Right to Tender outside of the Framework

The Contracting Authority intends to use the framework for the procurement of requirements falling within its scope during the specified period; however, it reserves the right to tender outside the framework for the procurement of any requirement without reference to the framework member. Admission to a framework does not guarantee the award of any contract to any economic operator, nor does it give the member the right to be consulted in respect of, or tender for, any contract.

Admission to the framework will be conditional upon acceptance of the Contracting Authority's framework agreement (Appendix 4) and the Contracting Authority's Terms and Conditions for all Contracts (Appendix 5).

4.9 Award to Runner Up for the conclusion of the Framework

If for any reason, it is not possible to establish the framework agreement or award the initial contract to the designated successful tenderer emerging from this competitive process; the Contracting Authority reserves the right to establish the framework with the next highest scoring tenderer based on the terms advertised at any time during the tender validity period. This shall be without prejudice to the right of the Contracting Authority to cancel this competitive process and/or initiate a new contract award procedure at its sole discretion.

Likewise, if having awarded a contract under the framework, the Framework Member cannot, for whatever reason, deliver the required services to the satisfaction of the

Contracting Authority; the Contracting Authority reserves the right to terminate the contract and their membership of the framework and to award the contract and framework membership by mutual agreement to the next highest-ranked tenderer on foot of the original procedure based on the terms advertised, at any time during the framework agreement tender validity period. This shall be without prejudice to the right of the Contracting Authority to cancel this competitive process and/or initiate a new contract award procedure at its sole discretion.

4.10 Replacement Personnel:

Notification must be sent in writing as soon as possible to the Contracting Authority on any proposed change of nominated personnel, such change to be subject to the written approval of the Contracting Authority. Replacement personnel must be of equal or better standing than the personnel originally nominated in terms of qualifications and experience.

4.11 Award of Project Management Contracts and Design Team Contracts to same Economic Operator

It is anticipated that the Contracting Authority will separately procure Project Management Services, Assigned Certifier and Property Advisory Services to act on their behalf.

For avoidance of doubt, companies may be appointed to both Frameworks, but where a successful tenderer is appointed as Design Team to a specific project, no member of their team will be permitted to be appointed as Project Manager to that project.

5. Specification of Requirements for Initial Contract under the Framework

The Framework agreement will be established on foot of a competition for an initial contract for Cherry Orchard.

The Initial Contract will be awarded to the top scoring tenderer shortly after the formal establishment of the framework agreement.

5.1 The Team

The Architect Led Design Team will comprise

- (a) Architectural Services (incl. design team lead, fire safety design services, disability access design services, employer's representative for the Works Contract, design certifier and assigned certifier services as defined under the Building Control (Amendment) Regulations 2014).
- (b) Civil & Structural Engineering Services,
- (c) Mechanical and Electrical Engineering Services

- (d) Quantity Surveying Services,
- (e) Landscape Architectural Services,
- (f) Project Supervisor for the Design and Construction Process,
- (h) Planning & Environmental Consultant,
- (i) Traffic Management Services,
- (k) Other ancillary design and consultancy services as required

The architectural services consultant will be the design team lead and will act as the single point of contractual responsibility, with the remaining key disciplines providing collateral warranties for the benefit of the Contracting Authority

5.2 Detailed Specification of Requirements

The Design Team will provide a comprehensive range of services, including but not limited to: feasibility studies, master-planning services, new build residential projects delivered through traditional contracts, new build residential projects delivered via design & build contracts, area regeneration projects, residential retrofit/refurbishment projects, conservation projects & works to protected structures, small works, public realm and precinct improvements, public buildings etc.

5.3 The Project – Cherry Orchard, Dublin

See Appendix 7 Outline Brief Cherry Orchard.

5 Award Criteria

Tenderers should ensure that they have submitted sufficient relevant information to allow their tenders to be assessed under each of the award criteria set out below.

The **framework/contract** will be awarded on the basis of the economically most advantageous compliant tender taking into account the following award criteria and weightings.

	Criteria	Weighting	Maximum Score	Minimum Score Required
A	Ultimate Cost to the Contracting Authority over the life of the contract	30%	3000	n/a
<p><i>Tenderers are required to outline their cost proposal by completing and signing the attached Form of Tender (Appendix 2) and providing a breakdown of their costs (Appendix 9 Pricing & Resource Breakdown excel sheet)</i></p> <p><i>The Ultimate Cost will be determined as follows</i></p> <ol style="list-style-type: none"> a) <i>LDA will apply the tenderers tendered hourly rates to the notional hours, leading to a notional figure for time charges;</i> b) <i>LDA will apply the tenderers tendered percentage fee rates to the notional construction cost values, leading to a notional lump sum fee for percentage fee charges;</i> c) <i>The lump sum fee for services (properly tendered) will be added to the above</i> d) <i>The total figure obtained from a) and b) and c) above will be the overall notional ultimate cost for the purpose of assessment.</i> 				
B	Resourcing of the Project / Technical Merit of the Team	30%	3000	1500
<p><i>Tenderers are required to submit details of the personnel proposed for the delivery of each stage of the contract (i.e. 1a. feasibility, 1b. preliminary design and planning, 2. detailed design, 3. tender action, evaluation and award, 4. construction, and 5. handover), together with their proposed overall project time allocations.</i></p> <p><i>Tenderers shall include the following:</i></p> <ul style="list-style-type: none"> • <i>Project Team Organisation Chart identifying consultants / sub-consultants making up the team and the key personnel.</i> • <i>CVs of the Key Team Members proposed for delivery of each stage of the contract, including the nominated Account Manager (as set out in Section 4.6), to include information with dates regarding expertise and experience. Note for projects referenced in CV's, indicate what stage of the project the person was involved in and their role/responsibilities. Maximum of 2 x A4 page per person.</i> • <i>A narrative identifying for the following disciplines (<u>only</u>):</i> <ul style="list-style-type: none"> ○ <i>Masterplanning and Architectural Design (excluding Design Certifier, Assigned Certifier, DAC, Fire, PSDP services),</i> ○ <i>Civil & Structural Engineering,</i> ○ <i>Mechanical and Electrical Engineering</i> 				

- Quantity Surveying
- Planning Consultant
- Sustainability Specialist

*the key personnel proposed for delivery of the project, including their responsibilities, relevant previous experience and the benefits that each of the personnel will bring to ensuring the successful delivery of the project. **Maximum of 5 x A4 page.***

Resourcing proposals will be assessed in respect of the quality and balance of resourcing offered.

Information included in the breakdown of Tender Sum in the Pricing & Resource Breakdown submitted with the Tender will form part of the assessment of this criterion.

Tenderers are required to complete Appendix 3 indicating the personnel proposed for the Project.

B	Execution Methodology	20%	2000	1000
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*Tenderers are required to submit their project-specific proposal for the effective delivery of the Project, management of the design team and liaison with stakeholders. **Maximum of 8 x A4 page.***

- *Tenderers must submit their proposed project-specific multidisciplinary approach and methodology for the delivery of each of the services required under the Contract to ensure the delivery of a timely and efficient service, clearly addressing each of the disciplines / roles set out in the service requirements.*
- *Tenderer must outline how they propose to ensure adherence to programme, budget, design brief and quality parameters as agreed with the Contracting Authority.*
- *Tenderers must outline (in narrative format as opposed to a Risk Register) their perceived key project-specific risks and proposed mitigation measures.*

C	Sustainable Design	10%	1000	500
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*Tenderers are required to demonstrate their project-specific approach to sustainable design with reference to the sustainable urban design brief contained in Appendix 7 Outline Brief Cherry Orchard. Tenderers are asked to submit a **Maximum of 6 x A4 pages** of text, diagrams & illustrations as appropriate in addition to a **Maximum of 2 x A3 Sheets (landscape format)** containing site specific sketches, images and other visual material as appropriate to illustrate the sustainable design concepts which will underpin their design approach.*

D	Cost Efficient Design	10%	1000	500
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*Tenderers are required to outline their project-specific proposed approach for ensuring cost efficient design and delivery solutions are brought to the fore. **Maximum of 4 x A4 page.** (In addition, tenderers can, if they so wish, include drawings or sketches as appendices (maximum 2 x A3 page)).*

NOTE 1: Tenderers should note that they must achieve a minimum rating of 50% for each of the individual qualitative criteria (B) to (E) in order to avoid elimination from the competition.

Qualitative criteria will be scored using the following baseline scoring system:

Score	Meaning	Interpretation
90 – 100%	Outstanding	An outstanding response demonstrating extensive understanding offering full assurance to client – fully supported with no reservations.
80 – 89%	Excellent	An excellent response demonstrating excellent understanding offering assurance to client – fully supported.
70 – 79%	Very good	A very good response demonstrating very good understanding offering assurance to client – strongly supported.
60 – 69%	Good	A good response demonstrating good understanding offering assurance to client – well supported.
50 – 59%	Acceptable	An acceptable response demonstrating a minimum understanding offering assurance to client - satisfactorily supported.
Less than 50% is unacceptable		

Marks between the base lines outlined above can be awarded where responses so merit additional marks.

NOTE 2: The lowest cost tender that also meets all of the minimum requirements of the qualitative award criteria will receive the maximum score achievable under this criterion. The scores of the other valid tenders will be calculated using the following formula:

Lowest Cost from a Bona Fide Tender	A
Cost for the tender being evaluated	B
Maximum Points available for Cost	3000*
Formula employed	$\frac{3000* \times A}{B}$

- NOTE 3: Tenderers should ensure in their tenders that they provide detailed information in respect of all aspects of the contract award criteria as stated above. This will enable the awarding authority to assess fully the extent of their offers.
- NOTE 4: Award of contract may be subject to attendance at a clarification and verification meeting. It would be essential that the key personnel assigned to this contract should be available and present at this meeting.
- NOTE 5: Tenderers should note that the Contracting Authority reserves the right to confirm that the financial and technical capacity of the tenderer is valid and unchanged prior to the award of any contract.
- NOTE 6: If the Contracting Authority considers the tender submission to be commercially unsustainable or otherwise problematic considering the tendered price or any other financial matter (including proposed indicative hours), the tenderer shall be invited to provide clarification to the Contracting Authority in respect of all elements of the tender submission that the Contracting Authority deems relevant. Any failure to satisfactorily comply with such a request, or to satisfactorily address the Contracting Authority's concerns, may, at the discretion of the Contracting Authority, result in the elimination of the tender in question based on it being considered abnormally low.

APPENDIX 1 - INSTRUCTIONS TO TENDERERS

(a) Submission of Tenders

The Contracting Authority is using the tender Postbox facility and tenders must be submitted electronically via the etenders postbox facility on www.etenders.gov.ie only. Tenderers must ensure that they give sufficient time to upload their tender response. All Tenders submitted in soft copy must be compiled such that they can be read immediately using PDF readers.

The Contracting Authority is not responsible for corruption in electronic documents. Tenderers must ensure electronic documents are not corrupt.

In responding to this tender all tenders must follow the format of the tender document and respond to each element of the tender document in the order as set out in this RFT. Tenders must be completed in English. Tenders should produce their response as a **SINGLE UPLOADED FILE, if possible, which is clearly labelled, page numbered and indexed with the exception of graphics which should be in a separate file.**

Tenderers must ensure that they give themselves sufficient time to upload and submit all required tender documentation before the tender closing date/time. Tenderers should take into account the fact that upload speeds vary. There is a maximum of 2.14 GB for individual files sent to the electronic postbox and a one-hour limit for upload. In order to submit a document to the electronic postbox, please note that you must click "Submit Response". After submitting you can still modify and re-send your response up until response deadline. Tenderers should be aware that the 'Submit Response' button will be disabled automatically upon the expiration of the response deadline.

Tenderers not familiar with uploading on eTenders should ensure they familiarise themselves with the process.

The closing date for tenders is **Friday 06th August 2021 at 17:00hrs**

It is the responsibility of the tenderer to ensure that their tender is complete and is uploaded by the designated deadline. **Tenders that are received late or via other means WILL NOT be considered in this public procurement competition**

(b) Queries

All queries regarding this tender should be through the Questions and Answers facility on www.etenders.gov.ie The closing date for receipt of queries is **Thursday 29th July 2021 at 12:00hrs**

Responses to queries will be circulated to all Tenderers through www.etenders.gov.ie in order to ensure that no party has an unfair advantage over any other.

For the purpose of circulating responses queries will be edited to avoid disclosing the identity of the querist, and any sensitive information included in the query should be

clearly indicated. Please note that the Contracting Authority cannot accept responsibility for information relayed (or not relayed) via third parties.

(c) Sufficiency & Accuracy of Tender

Tenderers will be deemed to have examined all the documents enclosed and by their own independent observations and enquiries will be held to have fully informed themselves as to the nature and extent of the requirements of the tender.

Tenderers are cautioned to check the accuracy of their tender prior to submission. A tender found containing any clerical errors or omissions may, at the sole discretion of the Contracting Authority, be referred back to the tenderer for correction. Any subsequent adjustment(s) must be confirmed in writing.

The Contracting Authority reserves the right to disqualify incomplete tenders.

(d) Tender Documents - Ambiguity, Discrepancy, Error, Omission

If you consider that you are missing any documents which would prevent you from submitting a comprehensive tender please contact us as soon as possible.

Tenderers shall immediately notify the Contracting Authority should they become aware of any ambiguity, discrepancy, error or omission in the Tender Documents. The Contracting Authority will, upon receipt of such notification, issue a clarification via eTenders in respect of any such ambiguity, discrepancy, error or omission. Such clarification shall then form part of the Tender Documents.

(e) Qualification of Tenders and Referential Bids

Please note that qualifications to a Tender may be considered a counter offer and may render the tender invalid. Tenders made by reference to other tenders are not valid and cannot be considered.

(f) Extension of Tender Period

The Contracting Authority reserves the right, at its sole discretion, to extend the closing date for receipt of tenders by giving notice in writing to all parties who have expressed an interest in the notice via eTenders no later than six days before the original closing date.

(g) Modifications to Tenders prior to the Closing Date for Receipt of Tenders

Modifications to Tenders will be accepted in the form of supplementary information and/or addenda, provided they are submitted electronically via the etenders postbox facility on www.etenders.gov.ie only before the closing date for receipt of tenders and clearly marked as part of the tender. Any modifications received, by whatever means, after the closing time for receipt of tenders will not be considered.

(h) Form of Tender

Tenderers are required to complete, sign and return the Form of Tender set out in Appendix 2 to this Invitation to Tender. Failure to sign the Form of Tender, or to complete it in the required format, will result in rejection of the tender.

(i) Cost of Preparation of Tender

The Contracting Authority will not be liable for any costs, charges or expenses incurred by tenderers in the preparation of proposals or any associated efforts. It is the responsibility of the tenderer to ensure that they are fully aware and understand the requirements as laid down in this document. Tenderers will be responsible for any costs incurred by them in the event that they are required to attend clarification or other meetings or make a presentation of their proposals.

(j) Clarification of Tenders

The Contracting Authority is entitled, but not obliged, to seek clarification of tenders, including pricing breakdowns in the course of the evaluation process. No change in the price or substance of the Tender shall be sought, offered or permitted. To assist in finalising the tender evaluation, selected tenderers may be invited to attend clarification meetings with the Contracting Authority.

(k) Correction of Errors

Detailed pricing of all tenders will be examined for errors that might alter the tender pricing as determined from the figures on the tender form or as between the hard copy and electronic versions of the tender. In general, the following approach will be applied to manifest errors where there is a discrepancy between the unit price and the total amount derived from the multiplication of the unit price and the quantity, the unit price as quoted will normally govern.

The amount stated in the tender form will be adjusted by the Contracting Authority in accordance with the above procedure and, with the agreement of the tenderer, shall be considered as binding upon the tenderer. Without prejudice to the above, a tenderer not accepting the correction of their tender as outlined may have their tender rejected.

(l) Tender Validity Period

To allow sufficient time for Tender assessment a Tender Validity period of 12 months is required, this period commencing on the closing date by which the Tenders are to be returned.

(m) Currency and Payments

The currency and invoices in which all prices and rates shall be tendered, and which payments under the contract will be paid, shall be Euros (€). All prices and rates quoted should be exclusive of VAT.

A schedule of payments will be agreed with the successful tenderer. The Contracting Authority operates in accordance with the European Communities (Late Payment in Commercial Transactions) Regulations 2012. The method of payment used by the Contracting Authority is normally Electronic Funds Transfer.

(n) Confidentiality

The distribution of the tender documents is for the sole purpose of obtaining offers. The distribution does not grant permission or licence to use the documents for any other purpose. Tenderers are required to treat the details of all documents supplied in connection with the tender process as private and confidential.

(o) Conflict of Interest

Any conflict of interest involving a tenderer (or tenderers in the event of a consortium bid) must be fully disclosed to the Contracting Authority. Any registrable interest involving the tenderer and the Contracting Authority or employees of the Contracting Authority or their relatives must be fully disclosed in the tender submission or should be communicated to the Contracting Authority immediately upon such information becoming known to the tenderer, in the event of this information only coming to their notice after the submission of a bid and prior to the award of the contract. The terms 'registrable interest' and 'relative' shall be interpreted as per Section 2 of the Ethics in Public Office Act, 1995. Failure to disclose a conflict of interest may disqualify a tenderer or invalidate an award of contract, depending on when the conflict of interest comes to light.

(p) Freedom of Information Acts

All responses to this invitation to tender will be treated in confidence and no information contained therein will be communicated to any third party without the written permission of the tenderer except insofar as is specifically required for the consideration and evaluation of the response or as may be required under law, including the Freedom of Information Act 2014, EU and Irish Government Procurement Procedures, or in response to questions, debates or other parliamentary procedures in or of the Oireachtas (the Irish Parliament).

Tenderers are asked to consider if any of the information supplied by them in response to this request for tenders should not be disclosed because of its sensitivity. If this is the case, tenderers should specify the information that is sensitive and the reasons for its sensitivity. The Contracting Authority cannot guarantee that any information provided by tenderers, either in response to this tender or in the course of any contract awarded as a result thereof, will not be released pursuant to the Contracting Authority's obligations under law, including the Freedom of Information Act 2014, EU and Irish Government Procurement Procedures. The Contracting Authority accepts no liability whatsoever in respect of any information provided which is subsequently released or in respect of any consequential damage suffered as a result of such disclosure.

(q) Tax Clearance

It will be a condition of award of this framework and any subsequent contract that the successful tenderer(s) comply with all EU and national tax laws. Tenderers are referred to the Irish Revenue web site <http://www.revenue.ie/>. Non-resident tenderers should apply to the Office of the Revenue Commissioners, Non Resident Tax

Clearance Unit, Office of the Collector General, Sarsfield House, Francis Street, Limerick, Ireland; e-mail: nonrestaxclearance@revenue.ie. The Contracting Authority will satisfy themselves that any tenderers being considered for award of a framework / contract are appropriately tax compliant by checking their status via the online system for which tenderers are requested to provide their Tax Clearance Access Number and Tax Reference Number to facilitate verification. By supplying these numbers tenderers acknowledge and agree that the Contracting Authority has the permission to verify its tax cleared position at any time during the term of the framework agreement / contract.

(r) Withholding Tax

Where applicable, payments shall be subject to Irish 'Professional Services Withholding Tax' at the prevailing rate (currently at 20%) as laid down by the Revenue Commissioners in Ireland. Non-residents may be able to reclaim such deducted Tax from the Office of the Revenue Commissioners in Ireland, International Claims Section located currently at Government Buildings, Nenagh, Co. Tipperary, Ireland (Tel: 353-1-6733533).

(s) Irish Legislation and Law

Tenderers should be aware that national legislation applies in other matters such as Employment, Working Hours, Official Secrets, Data Protection and Health and Safety. Tenderers must have regard to statutory terms relating to minimum pay and to legally binding industrial or sectoral agreements in the Contracting Authority tenders and in delivering contracts awarded to them.

The contract[s] awarded on foot of this tender process will be governed by Irish law.

(t) Dignity at Work

The successful tenderer(s) shall comply with all relevant legislation relating to dignity at work. As a public body and employer, the Contracting Authority is committed to a policy of equality of opportunity for all personnel.

(u) Interference and Inducement to Purchase

Any effort by the tenderer to unduly influence the Contracting Authority, relevant agency personnel or any other relevant persons or bodies in the process of examination, clarification, evaluation and comparison of tenders and in decisions concerning the Award of Contract shall have their tender rejected. In accordance with Section 38 of the Ethics in Public Office Act 1995 any money, gift or other consideration from a person holding or seeking to obtain a contract will be deemed to have been paid or given corruptly unless the contrary is proved.

(v) Notification of Tender Evaluations

All tenderers will be informed of the outcome of their proposals following tender evaluation and any necessary clarifications. Potential outcomes can be:

- When establishing frameworks with or without an initial contract

- a) Appointment to Framework and Letter of Intent (initial contract)
- b) Letter of Regret

In the case of EU value contracts, the following information will be provided in the Letter of Regret – name of successful tenderer designate; the applicable standstill period; scores of tenderer and that of successful tender; features and characteristics of the winning tender. The Contracting Authority will undertake not to award the contract for a period of at least 14 (or whatever period is stated in the notification letters) days from the date of notification of unsuccessful tenderers ('standstill period').

(w) Award Notices

Following the award of contract, award notices will be published on a quarterly basis in www.etenders.gov.ie for all national contracts exceeding €25k in value. This notice will state the name(s) of the successful tenderers.

Following the award of contract, an award notice will be despatched to the Official Journal of the European Union announcing the results of the competition no later than 30 days after the award of contract. It should be noted that it is standard practice for the Contracting Authority to include the price of the winning tender or the range of prices of tenders received in the publication of the award notice as required under European procurement rules.

(x) Policy on Personal Debriefings

Based on the provision of the information to unsuccessful tenderers as outlined above and due to resourcing constraints, the Contracting Authority will not be offering individual debriefing meetings to unsuccessful bidders.

(y) Replacement Personnel

Notification must be sent in writing as soon as possible to the Contracting Authority on any proposed change of nominated personnel, such change to be subject to the written approval of the Contracting Authority. Replacement personnel must be of equal or better standing than the existing personnel in terms of qualifications and experience.

(z) Copyright

the Contracting Authority will have copyright ownership of any material developed for use by the Contracting Authority under the terms of this tender. The service provider may have a non-exclusive licence to use such material but only for its own purposes (to be agreed with the successful tenderer)

(aa) Brand Names, etc.

Please note in relation to this tender document; where reference is made to a particular make, source, process, trademark, type or patent, that this is not to be regarded as a de facto requirement. In all such cases it should be understood that the reference in question is accompanied by the words "or equivalent".

(bb) Payment

A schedule of payments will be agreed with the successful tenderer. The Contracting Authority operates in accordance with S.I. 580 of 2012 which transposes EU Directive 2011/7/EU on combating Late Payment in commercial Transactions. The method of payment used by the Contracting Authority is normally Electronic Funds Transfer. Payments for services provided to the Contracting Authority will only be issued once Contract Terms and Conditions have been executed.

(cc) Right Not to Award

The Contracting Authority does not bind itself to accept the most economically advantageous tender or any tender. It also reserves the right to accept or reject in whole or in part any or all tenders received, and, in particular, to source the requirement with more than one service provider.

The invitation to tender is issued in good faith; however, the Contracting Authority at its sole discretion shall not be obliged to award a contract or proceed to further stages in the procurement process and reserves the right to cancel the procurement at any time.

(dd) Environmental Aspects

The Contracting Authority is committed to the principles of environmental management in its activities and it encourages the implementation of sustainability principles in its procurement practices. Tenderers/contractors should make all reasonable efforts to minimise adverse environmental impact in the methods of services delivery and in materials used.

(ee) Accessibility

In line with the Disability Act 2005, accessibility requirements should be clearly stated in request for tenders / quotations where applicable. Under Section 27 of the Act the Contracting Authority is required to ensure that both the goods supplied, and services provided to it are accessible to persons with disabilities.

(ff) Knowledge and Skills Transfer

It will be a condition of the contract that opportunities for the transfer of skills and/or knowledge from the Tender/Tender's staff to the Contracting Authority staff will be availed of during the course of the contract or prior to the handing over of the finished work/product.

(gg) Collusive Tendering

If any Tendering Party is found to have, at any time, offered to give or to have agreed to offer or give to any person, any bribe, gift, gratuity, commission or consideration of any kind as an inducement or reward for taking or forbearing to take any action in relation to the obtaining of its Tenders, or for showing or forbearing to show any favour or disfavour to any person in relation to its Tenders, the bid submitted by such Tendering Part shall be automatically disqualified and the circumstances surrounding such action shall be referred to the appropriate authority.

(hh) Change in the Composition of a Tender

The Contracting Authority reserves the right, but is not obliged, to disqualify any Tenderer that makes any change to its composition after submission of a Tender.

(ii) Consortia and Prime Subcontractors

The Contracting Authority seeks to encourage participation on a fair and equal basis by Small and Medium Enterprises (“SME”s) in this Competition. SMEs that believe the scope of this Competition is beyond their technical or business capacity are encouraged, subject to this paragraph, to explore the possibilities of forming relationships with other SMEs or with larger enterprises. Through such relationships they can participate and contribute to the successful implementation of any Services Contracts that may result from this Competition and therefore increase their social and economic benefits.

Larger enterprises are also encouraged, subject to this paragraph, to consider the practical ways that SMEs can be included in their proposals to maximise the social and economic benefits of any Services Contracts that may result from this Competition.

Where a group of undertakings (in whatever form and regardless of the legal relationship between them) come together to submit a Tender in response to this RFT the the Contracting Authority will deal with all matters relating to this Competition through the entity who will carry overall responsibility for the performance of the Services Contract only (the “Prime Contractor”), irrespective of whether or not tasks are to be performed by a subcontractor or other consortium member (the “Subcontractor”). The Tenderer must clearly and comprehensively set out the name, title, telephone number, postal address, facsimile number and email address of the nominated contact personnel of the Prime Contractor authorised to represent the Tenderer and to whom all communications shall be directed and accepted until this Competition has been completed or terminated. Correspondence from any other person (including from any Subcontractor) will NOT be accepted, acknowledged or responded to.

(jj) Anti-Competitive Conduct

Tenderers attention is drawn to the Competition Act 2002 (as amended, the “2002 Act”). The 2002 Act makes it a criminal offence for Tenderers to collude on prices or terms in a public procurement competition.

(kk) Data Protection

Data Protection Laws” means all applicable national and EU data protection laws, regulations and guidelines including but not limited to Regulation (EU) 2016/679 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (the “General Data Protection Regulation”), the Data Protection Act, 2018 and any guidelines and

codes of practice issued by the Data Protection Commission or other supervisory authority for data protection in Ireland from time to time.

The Contracting Authority will be a Controller (where Controller has the meaning given under the Data Protection Laws) in respect of any Personal Data (where Personal Data has the meaning given under the Data Protection Laws) required to be provided by the Tenderer in response to this Request for Tender.

The Tenderer, as Controller in respect of any Personal Data provided by it in its Tender, is required to confirm by way of statement in the “Declarations” section of the accompanying Tender Response Document that all Data Subjects (where Data Subject has the meaning given under the Data Protection Laws) whose Personal Data is provided by the Tenderer have consented to the processing of such Personal Data by the Tenderer, the Contracting Authority, the Evaluation Team and the supplier of the etenders.gov.ie website, for the purposes of the participation of the Tenderer in this Competition or that the Tenderer otherwise has a legal basis for providing such Personal Data to the Contracting Authority for the purposes of its participation in this Competition.

(II) Publicity

Tenderers shall not undertake (or permit to be undertaken) at any time, whether at this stage or after the award of the agreement, any publicity activity with any section of the media in relation to this tender/agreement other than with the prior written consent of the Contracting Authority. Such consent shall extend to the content of any publicity. For the purposes of this paragraph, the word “media” includes (but is not limited to) radio, television, newspapers, trade and specialist press, the Internet and e-mail accessible by the public at large and the representatives of such media.

The Contracting Authority will have the right to publicise or otherwise disclose to any third-party information regarding this process and the agreement.

APPENDIX 2 – FORM OF TENDER

THIS FORM OF TENDER MUST BE COMPLETED AND RETURNED BY ALL TENDERERS.

Failure to sign this Form of Tender will invalidate the offer.

To:	The Contracting Authority
From:	
Re:	Architect-Led Design Team Framework

I/We have examined the tender documentation and hereby offer to provide the services in accordance with the details contained within the Invitation to Tender Document and the attached Detailed Breakdown of Charges and Expenses.

Total Fee	Total Fee proposed (Excluding VAT)	Total Fee proposed (Including VAT)
1.1 Fixed Lump Sum Fee (Stage 1)	€	€
1.2 Fixed Lump Sum Fee (Stages 2-5)	€	€
2.1 Percentage Fees (Lower Density)	€	€
2.2 Percentage Fees (Higher Density)	€	€
3.0 Additional Notional Hours	€	€
Ultimate Total Cost	€	€

1.1 Fixed Lump Sum Fee:

1.1 Fixed Lump Sum Fee	Total Fee proposed (Excluding VAT)		Total Fee proposed (Including VAT)	
Proposed Total Fee for delivery of the Initial Planning Application (area highlighted red on site plan), to include masterplan for overall lands, key enabling infrastructure and an EIAR. Stage 1. <i>(To include all expenses).</i>	€		€	
Pricing & Resource Breakdown is attached:	YES		NO	

1.2 Fixed Lump Sum Fee:

1.2 Fixed Lump Sum Fee	Total Fee proposed (Excluding VAT)		Total Fee proposed (Including VAT)	
Stage 2 Detailed Design Stage	€		€	
Stage 3 Tender Action, Evaluation and Award	€		€	
Stage 4 Construction Stage	€		€	
Stage 5 Handover Period	€		€	
Proposed Total Fee for delivery of the Post Grant of Planning through to Construction & Handover <u>of a portion of the Initial Planning Application</u> including all key enabling infrastructure. Stages 2-5. <i>(To include all expenses).</i>	€		€	
Pricing & Resource Breakdown is attached:	YES		NO	

2. Tendered Percentage Fees:

Percentage Fee* relating to the following:		Percentage Fee*	Notional Construction Cost	Notional Lump Sum Fee (Excluding VAT)
2.1	<p>Project implementation of a lower density (0-4 storey) residential development scheme (No. of Units to be determined) on a traditional contract basis (i.e. Employer designed, with the Architect acting as Employers Representative) – feasibility and planning, detailed design and statutory approvals, tender action, evaluation and award, construction, handover & defects period – Project Stages 1-5 of the Scope of Services.</p> <p>Assume a Construction Cost of circa €35m with indicative programme duration of circa 6 months Stage 1 and circa 30 months Stage 2 - 5 (excl. Defects period)</p>	%	€35,000,000	€
2.2	<p>Project implementation of a higher density (5-8 storey, with element of 9-10 storey and ground floor non-residential) residential development scheme (No. of Units to be determined) on a traditional contract basis (i.e. Employer designed, with the Architect acting as Employers Representative) – feasibility and planning, detailed design and statutory approvals, tender action, evaluation and award, construction, handover & defects period – Project Stages 1-5 of the Scope of Services.</p> <p>Assume a Construction Cost of circa €60m with indicative programme duration of circa 9 months Stage 1 and circa 36 months Stage 2 - 5 (excl. Defects period)</p>	%	€60,000,000	€
Notional Lump Sum Fee (sum of the two items above):				€
<p>* Note: Where fees are tendered as a percentage calculation, and provision of these services is to proceed, it will be the intention to convert the percentage to a lump sum fixed fee at an agreed appropriate stage but no later than Client sign off on the detailed cost plan for the project or phase thereof. The basis for a fee percentage shall be the agreed estimated Construction Cost (Ex. VAT) for the works.</p>				

The construction costs above are notional and provide no guarantee of work to be awarded under this framework agreement.

3. Additional Notional Hours:

Role	Hourly Rate (Eur)	No. of Hours	Total (Excluding VAT)
Architectural Services			
Principal Architect		200	€
Masterplanning Architect / Urban Designer		200	€
Senior Architect		200	€
Associate Architect		200	€
Assistant Architect		200	€
Civil & Structural Engineering			
Principal Civil & Structural Engineer		200	€
Senior Civil & Structural Engineer		200	€
Associate Civil & Structural Engineer		200	€
Assistant Civil & Structural Engineer		200	€
Mechanical & Electrical Engineering			
Principal Mechanical & Electrical Engineer		200	€
Senior Mechanical & Electrical Engineer		200	€
Assistant Mechanical & Electrical Engineer		200	€
Quantity Surveying			
Senior Quantity Surveyor		200	€
Junior Quantity Surveyor		200	€
Landscape Architect			
Senior Landscape Architect		200	€
Associate Landscape Architect		200	€
PSCS/PSDP			
PSDP		200	
Planning & Environment			
Senior Planning Consultant		200	€
Senior Environmental/Sustainability Consultant		200	€
Traffic Management			
Senior Traffic Management Consultant		200	€
Total		4,000	

The hours set out above are notional and provide no guarantee of work to be awarded under this framework agreement. They are being used purely to enable assessment of the notional cost for the framework agreement.

I/We confirm that I/we

- In relation to daily/hourly fees all rates are inclusive of out of pocket (i.e. mileage, subsistence, phone, postage, etc.) and account / contract management related costs.
- Will keep this offer for the contract / framework open for acceptance by you for a period of 12 months from the date of deadline for submission of Tenders,
- Agree that you are not bound to accept the most economically advantageous or any Tender you may receive,
- Agree that the rates stated are maximum prices for the duration of the framework agreement,
- Have read and thoroughly examined the Tender Document,
- Fully understand the Tender Document and the Client's requirements,
- Undertake to treat the details of this Invitation to Tender, its Tender and any subsequent negotiations as private and confidential,
- Acknowledge that acceptance by the Contracting Authority of this tender will not constitute a binding and enforceable agreement and that a legally enforceable agreement will not exist until and unless the framework agreement has been established between the Contracting Authority and the Tenderer,
- Have availed of all offers for additional information or have otherwise satisfied myself/ourselves as to conditions that may in any manner affect the performance of the services required under the framework agreement,
- Have included all elements necessary for the performance of the specified services, which are either expressly stated in the Tender Document or contained in any supplementary information or which could reasonably be inferred therefrom,
- Have found no errors, omissions, conflicts or ambiguities in the Tender Document except those which I/We have brought to the attention of the Contracting Authority before the latest date for submitting queries,
- Have included for compliance with all statutory requirements applicable in Ireland and those applicable in any country where parts of the contract may be performed that are in force 7 days prior to the deadline for receipt of Tenders,
- Will not, if awarded a contract employ labour in a manner that is discriminatory in relation to gender, race, religious beliefs, age etc.,

Signed:			
Name (in Capital Letters):			
On behalf of:			
Address:			
Telephone:		Fax:	
Email:		Date:	

APPENDIX 3 – RESOURCE ALLOCATION SCHEDULE

[Tenderers are permitted to add lines for additional project personnel]

Name of Tenderer:		
Role	Personnel Involved (<i>please name</i>)	CV's attached
Nominated Account Manager		
Architectural Services		
Principal Architect		
Senior Architect		
Associate Architect		
Assistance Architect		
Design Certifier		
Assigned Certifier		
Civil & Structural Engineering		
Principal Civil & Structural Engineer		
Senior Civil & Structural Engineer		
Associate Civil & Structural Engineer		
Assistant Civil & Structural Engineer		
Mechanical & Electrical Engineering		
Principal Mechanical & Electrical Engineer		
Senior Mechanical & Electrical Engineer		
Assistant Mechanical & Electrical Engineer		
Quantity Surveying		
Senior Quantity Surveyor		
Junior Quantity Surveyor		
Landscape Architect		
Senior Landscape Architect		
Associate Landscape Architect		
PSCS/PSDP		
PSDP		
Planning & Environment		
Senior Planning Consultant		
Senior Environmental/Sustainability Consultant		

Traffic Management		
Senior Traffic Management Consultant		

Tenderers must guarantee that the above personnel shall be fully available or that any proposed change to the above allocation will be agreed in writing with the Contracting Authority. Where a given staff member is not able to do the work indicated, the tenderer must provide a substitute of similar qualifications and experience who is acceptable to the Contracting Authority

APPENDIX 4 – FRAMEWORK AGREEMENT TERMS AND CONDITIONS

APPENDIX 5 – THE CONTRACTING AUTHORITY TERMS AND CONDITIONS

Refer to attached folder containing the following;

- 1) Lead Consultant Appointment including
 - a. Appointment of Assigned Certifier
 - b. PSDP Appointment
 - c. Subconsultant Appointment
- 2) Early stage short form Appointment.

For clarity – the short form agreement will only be used for master planning/ early stage use. Each mini-competition tender issue will indicate which of the T&Cs noted above will be applicable for that specific competition. Tenderers will have to confirm acceptance of both T&Cs to be placed onto the framework.



APPENDIX 6 – DATA PROTECTION AGREEMENT

To be signed and returned as part of the tender submission

APPENDIX 7 – OUTLINE BRIEF, CHERRY ORCHARD

APPENDIX 8 – DETAILED SCOPE OF SERVICES

APPENDIX 9 – PRICING AND RESOURCE BREAKDOWN



APPENDIX 10 – SCHEDULE OF INSURANCES & SERVICE INSURANCE QUESTIONNAIRE

To be signed and returned as part of the tender submission

APPENDIX 11 – KEY PERFORMANCE INDICATORS

To be issued as a tender addendum



Professional Services
Architect Led Design Team for
Land Development Agency

Framework Scope of Services

September 2020

Table of Contents

1	Services Required.....	4
1.1	Overview	4
1.2	Safety, Health & Welfare	4
1.3	Building Control (Amendment) Regulations 2014	4
1.4	Team Disciplines.....	6
1.5	Drawing Deliverables	12
1.6	Specialist Services	12
1.7	Project Stages.....	13
2	Stage 1a – Feasibility, Urban Design / Masterplan & Outline Design Stage	15
2.1	Architectural Services and Architectural Services – Masterplan and Urban Designer	15
2.2	Mechanical & Electrical Services.....	16
2.3	Quantity Surveyor Services	18
2.4	Civil & Structural Engineering Services	18
2.5	Landscape Architectural Services.....	20
2.6	Project Supervisor Design Process (Health & Safety PSDP) Services	20
2.7	Planning and Environmental Consultancy Services	21
2.8	Traffic & Transport Services	22
2.9	Archaeology Consultancy Services.....	23
3	Stage 1b – Preliminary Design and Planning Application Stage	25
3.1	Architectural Services	25
3.2	Architectural Services – Masterplan and Urban Designer	25
3.3	Mechanical & Electrical Engineering Services.....	26
3.4	Quantity Surveyor Services	27
3.5	Civil & Structural Engineering Services	27
3.6	Landscape Architectural Services.....	28
3.7	Project Supervisor Design Process (Health & Safety PSDP) Services	28
3.8	Planning and Environmental Consultancy Services	29
3.9	Traffic & Transport Services	30
3.10	Archaeology Consultancy Services.....	30
4	Stage 2 – Detailed Design and Statutory Approvals	31

4.1	Architectural Services	31
4.2	Quantity Surveyor Services	32
4.3	Mechanical & Electrical Engineering Services.....	33
4.4	Civil & Structural Engineering Services	35
4.5	Landscape Architectural Services.....	36
4.6	Project Supervisor Design Process (Health & Safety PSDP) Services	37
4.7	Planning and Environmental Consultancy Services	37
4.8	Traffic & Transport Services	38
4.9	Archaeology Consultancy Services.....	38
4.10	Assigned Certifier	39
4.11	Design and Ancillary Certifier(s).....	39
5	Stage 3 – Tender Action, Evaluation, Award.....	40
5.1	Architectural Services	40
5.2	Mechanical & Electrical Engineering Services.....	40
5.3	Quantity Surveying Services.....	40
5.4	Civil & Structural Engineering Services	42
5.5	Landscape Architectural Services.....	42
5.6	Project Supervisor Design Process (Health & Safety PSDP) Services	42
5.7	Planning and Environmental Consultancy Services	43
5.8	Traffic & Transport Services	43
5.9	Archaeology Consultancy Services.....	43
6	Stage 4 – Construction	44
6.1	Architectural Services	44
6.2	Mechanical & Electrical Engineering Services.....	46
6.3	Quantity Surveying Services.....	47
6.4	Civil & Structural Engineering Services	48
6.5	Landscape Architectural Services.....	50
6.6	Project Supervisor Design Process (Health & Safety PSDP) Services	51
6.7	Planning and Environmental Consultancy Services	51
6.8	Traffic & Transport Services	51
6.9	Archaeology Consultancy Services.....	51

6.10	Assigned Certifier	51
7	Stage 5 – Handover and Defects Period	53
7.1	Architectural Services	53
7.2	Mechanical & Electrical Engineering Services.....	53
7.3	Quantity Surveying Services.....	54
7.4	Civil & Structural Engineering Services	54
7.5	Landscape Architectural Services.....	54
7.6	Project Supervisor Design Process (Health & Safety PSDP) Services	55
7.7	Planning and Environmental Consultancy Services	55
7.8	Assigned Certifier	56
7.9	Multi-Disciplinary Services on Handover	56
7.10	Final Account Report Supplement	56
8	General Services for All Stages.....	57
8.1	Fire Safety Engineering	57
8.2	Disability Access Engineering	61

1 Services Required

1.1 Overview

This scope of the services document covers the feasibility, master-planning, preliminary design, planning application, detailed design, procurement of works contractor(s), contract administration, works supervision and handover of Project Stages of the project summarised in Section 1.6 and more particularly described in Sections 2 to 7.

The Architect Led ALDT (“ALDT”) will be responsible for providing all planning and construction-related technical advice, including Master-planning design services to the Contracting Authority A (“CA”) in respect of the project.

The ALDT will be required to liaise with the CA’s Project Manager, Property Advisor and other relevant appointed consultants, as required in the delivery of their services. The ALDT will be required to progress site feasibility studies, design studies and master planning demonstrating vision while being sensitive to the surrounding environment. The ALDT consultants will be required to provide services included in this Scope of Services document for the Project Stages.

The consultant team must perform their duties professionally, adequately, efficiently and in accordance with best practice and ethics to achieve the outputs required.

The consultant team must carry out all works in accordance with the current applicable procedures as set out in the Capital Works Management Framework documents as set out by Department of Public Expenditure and Reform and in compliance with EU and Irish legislation.

This Scope of Services document is to be read in conjunction with the Outline Brief and the Tender documents issued with the relevant request for mini-tender.

1.2 Safety, Health & Welfare

The ALDT shall address all issues related to health and safety that may be associated with the design and works and shall perform its duties in accordance with the Safety, Health and Welfare at Work Act 2005 and the Safety, Health and Welfare at Work (Construction) Regulations 2013, including the oversight of all CA obligations under the regulations. All ALDT members shall provide timely inputs into all necessary health, safety & welfare documentation including design risk assessments, preliminary and final health and safety plans and review of risk assessments and method statements.

1.3 Building Control (Amendment) Regulations 2014

Carry out the role of Design and Assigned Certifier and associated duties as required under the Building control (amendment) Regulations 2013-S.I. No 80 of 2013, S.I. No 9 of 2014 or any subsequent update in line with the agreed format of the ancillary certs and in accordance with Code of Practice for Inspecting and Certifying Buildings and Works; Building Control Regulations 2014

As a minimum this should include:

- Liaise with Employer, Project Manager and Design Team to understand the history, status and delivery programme for the project,
- Liaise with Employer, relevant Stakeholders, Project Manager and appointed Consultants / Contractors to deliver the Service,
- Develop a methodology for implementation of the Building Control (Amendment) Regulations (BCAR) on the project
- Develop a detailed inspection plan, taking account of any phasing required for the specific project,
- Inspect, and co-ordinate the inspection activities of others during construction, and certify the building/works on completion,
- Provide, sign and lodge the relevant statutory certificates - the form of undertaking at Commencement and the Certificate of Compliance on Completion.
- Provide a Monthly Progress report for the client including elemental BCAR signoff as the project progresses, to include:
 - Update on certificates received or outstanding
 - Variance/non-conformance with the inspection plan
 - % of Inspection plan and updated live progress report of inspections

The Architect will be required to act as design certifier for the project in accordance with the Building Control (Amendment) Regulations 2014.

The Architect and sub consultants will be required to provide Ancillary Certificates for the project in accordance under the Building Control (Amendment) Regulations 2014.

The CA will act as Building Owner under the Building Control Act 2014 and be responsible for paying Commencement Notice fees.

The ALDT will exercise all reasonable skill, care, and diligence to ensure that the buildings are designed and constructed in accordance with the relevant requirements of the Building Regulations. The persons assigned by them should be competent for the work they undertake.

All ALDT members will provide services and will be responsible for undertaking all activities required by designers in accordance with the Building Control Regulations 2014 as set out in the Code of Practice for Inspecting and Certifying Buildings and Works (2014):

- (a) design their respective elements of work in accordance with the applicable requirements of the Second Schedule to the Building Regulations.
- (b) provide the Design Certifier with the necessary plans, specifications and documentation that is required for lodgement at commencement stage.
- (c) arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
- (d) as agreed with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the Design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.

- (e) notify the Assigned Certifier of their proposed inspection regime for inclusion in the overall Inspection Plan.
- (f) provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier; and
- (g) maintain records of inspection.

1.4 Team Disciplines

The ALDT services will cover the following disciplines:

1.4.1 Design Team Leader

The Architectural services consultant will be the Design Team Leader (“DTL”) for all stages and will act as the single point of contractual responsibility, with the remaining key disciplines providing collateral warranties for the benefit of the CA. The Project Architect shall take overall responsibility of the ALDT and be wholly responsible for the provision of consultancy services provided by the ALDT.

The DTL will (1) coordinate the development of all design information produced by the ALDT, ensuring the production of high quality information; and (2) coordinate the activities of individual ALDT members and staff in order to efficiently deliver the services within timeframes as agreed with the CA. A senior representative of the Project Architect will be identified as the individual responsible for ensuring the role of the DTL is effectively implemented in all tenders.

The DTL shall take all instructions from, and engage with, the CA and the CA’s appointed representatives to review CA procedures and design standards to ensure adherence by the ALDT and shall act on behalf of the CA throughout the project. The DTL shall obtain permission from the CA to start each stage of the services. The DTL shall determine lines of responsibility between all ALDT members including inputs and lines of communication, reporting formats and programme each work task for all stages. The DTL shall ensure all ALDT design information is being distributed and stored appropriately via the CA’s online electronic document management system.

Each team will be required to use a common data environment for sharing project information with the design team, the LDA and specific stakeholders. The LDA is currently using the BIM 360 platform and will develop a Folder Security Matrix for each Call-off Contract. A member of the design team either the Design Team Leader or Project Manager will be requested to purchase a package of licences for each individual project. It will be the responsibility of the DTL to ensure that all ALDT members are utilising BIM 360 in a coordinated manner and in accordance with LDA document management procedures.

The DTL will be required to support the CA in managing communications with all relevant stakeholders involved in the Project. including, inter alia, planning authorities, local authorities, utility companies, adjacent landowners, developers, management companies, neighbours, statutory bodies, government departments and resident groups. LDA to pre-approve all formal communications with statutory bodies.

1.4.2 Architectural Services

The Project Architect will be required to provide all of the professional architectural services (including the specialist skills listed below) as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project. Specialist skills required are:

- a) Conservation Architect
- b) Fire Safety Design Services
- c) Disability Access Design Services
- d) Employer's Representative for the Works Contract
- e) Assigned and Design Certifier services as defined under the Building Control (Amendment) Regulations 2014
- f) Landscaping & Visual Impact Assessment (LVIA) and Graphics (including verified views and CGIS)
- g) Topographical surveys, asbestos and Measured Building Surveys of existing buildings
- h) Acoustics
- i) Specialist building certifiers, e.g., Well Certifier
- j) Site boundary identification and verification including statutory declarations of identity where required by the CA
- k) Building Surveys where required and unless otherwise stated are part of the duties of the Architect and relevant disciplines.

1.4.3 Architectural Services - Masterplan and Urban Designer

The aim of the development is to create a vibrant and varied community to provide residential & support facilities with links to the surrounding areas. In addition, environmental improvements to ensure linkages with the surrounding locality is a further key objective with the creation of strategic urban open spaces etc.

The ALDT are required to:

- Act as consultant for the design master plan for the development of the site, to include new housing, new open spaces and new community facilities; provide such drawings, 3-D models and views and reports as required to describe the plan; and participate in public display and presentations to the relevant stakeholders
- Advise on the development and interaction with community facilities (including local retail and leisure etc.)
- Examine and make recommendations for working with the proposed mix of tenure on the lands to create a sustainable model going forward. Advise on the distribution of tenures.
- Develop an integrated urban design strategy covering local transportation, cycling, movement and parking; streetscape and the public realm; place-making; boundaries and edges; integration of features; retention of trees and enhancement of tree planting; appropriate materials and building forms.
- Identify urban design characteristics for each block/zone within the masterplan lands.
- Provide a public realm design guide for use throughout the Masterplan areas
- advise on phasing and social sustainability issues.
- consideration of residential mix, form, massing, and density
- consideration of Social Sustainability
- consideration of energy requirements and efficiencies / sustainable dwellings

- Vehicular, cycle and pedestrian access to and from the site
- Transportation, movement, and parking are to be designed, so far as possible in accordance with the Design Manual for Urban Roads and Streets (DMURS) published by the Department of the Environment.
- Designers should advise and make design proposals generally for place making and public realm improvements generally.
- Liaise with residual team members to examine impact / limitations of the scheme vis-à-vis existing utilities and services.

The Master Planning / Urban Designer will be required to work closely with all members of ALDT and the CA's appointed consultants.

1.4.4 Civil & Structural Engineering Services

The Civil/Structural Engineer shall provide all of the professional engineering services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project.

The Civil & Structural Engineer will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.5 Mechanical, Electrical & ICT Engineering

The Mechanical & Electrical Engineer shall provide all of the Mechanical, Electrical and Information Communications Technology services consultancy services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project. These services may include specialist energy design and certification services, e.g., BER, Passive, LEED, BREEAM, Wired-Score.

The M&E Engineer will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of M&E services during all project stages and to adopt an energy efficient design approach.

1.4.6 Quantity Surveyor

The QS shall provide professional quantity surveying services as necessary to comply with the Contracting Authority's (CA) instructions and to ensure a satisfactory completion of the Project. The Quantity Surveyor shall engage directly with and act on behalf of the client to ensure accurate cost planning and ongoing monitoring of expenditure to ensure that the project is executed within the approved budget.

The QS is to liaise with the design team, Project Manager (PM), Property Advisor, and relevant appointed consultants in addition to the LDA Development Manager (LDA DM) / Project Managers (LDA PM) and other LDA Stakeholders, including planning, legal, insurance and commercial advisors as required in the delivery of their services.

1.4.7 Landscape Architectural Services

The Landscape Architect shall provide all of the professional landscape architectural services as necessary to comply with the CA instructions and to ensure a satisfactory completion of the Project.

The Landscape Architect will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.8 Project Supervisor for the Design Process

The Project Supervisor for the Design Process shall provide all of the professional PSDP services as necessary to comply with their responsibilities under the Safety, Health & Welfare at Work (Construction Regulations) 2013, the CA instructions and to ensure a satisfactory completion of the Project.

The PSDP will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient approach.

1.4.9 Planning and Environmental Consultancy Services

The Planning and Environmental Consultant shall provide all of the professional services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project. Specialist skills required as follows / associated with the following:

- a) Expert planning advices
- b) Contaminated Land & Remediation Specialist / Construction & Demolition Waste Management Plan (C&D WMP)
- a) Asbestos Specialist
- b) Noise Specialist
- c) Air Quality Specialist
- d) Ecology
- e) Mammal Expert
- f) Ornithologist
- g) Sunlight and Daylight Impact Studies and Report
- h) Wind report
- i) Appropriate Assessment Screening and if required Natura Impact Statement.
- j) Environmental Impact Assessment and/or Statement
- k) Ecological Impact Assessment
- l) Bat Specialist
- m) Arborist / Tree Specialist

Note a number of physical site surveys are noted as to be procured and co-ordinated by the ALDT and the surveys reimbursed by the Contracting Authority in section 1.5 above.

The Planning and Environment Consultant will be required to work closely with the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an energy efficient.

Key tasks for the successful planning consultant during the project are:

- Arrange, chair and minute meetings with the Local Authority. Circulate the minutes of such meetings to the Client and Project Manager.
- Carry out such services as you consider necessary to maximise the Client's chances of obtaining planning permission for the development.
- Reviewing on an on-going basis the developing design to ensure that it is compatible with the requirements of the Planning Authority. Advising on areas of divergence.
- Provide a copy of the planning permission and any discharge of condition notices to the Client and Project Manager promptly.

- If required, input to the report at the completion of any work stage in advance of completion of such “work stage”.

1.4.10 Traffic & Transport Services

The Traffic & Transport Consultant shall provide all the professional consultancy services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project.

The Traffic & Transport Consultant will be required to work closely with the architect to ensure that traffic management, parking, and traffic impact considerations (including before and after analysis) are incorporated in the overall design.

The Traffic & Transport Consultant will be required to work closely with the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.11 Archaeology Services

The Archaeologist shall provide all of the professional services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project.

1.4.12 Technical Advisory Services

The services included herein are described on the basis that the ALDT will provide these services directly to the CA. However, the CA reserves the right to under any Call-Off Contract to novate the ALDT or any member of the ALDT to a construction contractor. In the event that any Call-off Contract proceeds on the basis of a design and build form of construction contract and the ALDT, or any part thereof, is not novated to the successful main contractor(s), the ALDT shall provide Technical Advisory services to the CA in order to, inter alia, ensure that the developed detailed design information as prepared by the construction contractor(s) shall continue to meet or exceed the CA's brief and technical requirements. The ALDT will be required to establish appropriate performance specifications and to provide all services necessary to review and certify (to the CA) the contractors' design on a timely basis. Where this requires a reduction in the scope of services being provided, a variation will be issued, and the price reduction shall be determined following negotiation and based on the applicable hourly rates. It should be noted Project Supervisor for the Design Process will not be novated to a construction contractor.

1.4.13 Due Diligence Services

The CA will be actively seeking investment opportunities in completed developments and therefore will require multi-disciplinary technical due diligence services on all aspects of completed developments to support CA and/or other funder commitments.

The requirement for due diligence services will be defined in the mini tender project brief.

- The ALDT may be required to work with the LDA and appointed, QS, Property/ Valuation, Legal and Other Advisors to complete comprehensive due diligence which will include, but is not limited to:
 - Commentary on asset and site characteristics (features inside site boundary) including overall scheme assessment, planning, unit typologies, number of 1/2/3 beds etc., development specification, unit standards and site amenities.
 - Assessment and commentary regarding viability to include:

- Value for money,
 - Net and gross internal area including evaluation of ratios,
 - Design and cost efficiency with particular reference to layouts, bed spaces, building aspect, parking (spaces & location), private amenity space, communal amenity space, ceiling heights, fit out / furniture and specifications.
 - Environmental considerations
 - Transport and accessibility
 - Services and utilities
 - Assessment of operational costs
 - Level of affordability (rental levels / affordability threshold / future sales levels)
 - Capital requirements
 - Delivery programme & timelines
 - Sensitivity / Risk analyses
 - Other viability requirements as required
- The ALDT may be required to prepare example internal layouts as part of the due diligence process.
 - Provide advice in relation to technical clauses and development specifications for inclusion in contracts.
 - Provide a comprehensive due diligence report.

1.4.14 Project Monitoring Services

The requirement for project monitoring services will be defined in the mini tender project brief. If required, the following scope of service will apply:

- Ensure the interests of the LDA are protected.
- Work as part of a technical monitoring team to ensure a successful outcome for the project and completion of the development in accordance with the:
 - development agreement / other legal agreement(s),
 - all relevant laws and regulations,
 - project programme and budget
 - quality requirements defined in the development agreement.
- Provide technical advice in relation to contractual clauses and development specifications for inclusion in contracts.
- Liaise and support the LDA project team (LDA DM, PM, legal, commercial, property etc) as required in the execution of legal agreements.
- Provide monthly technical reports on project progress.
- Prepare reports and documents as required by or on behalf of the CA.
- Challenge, review, comment and provide recommendations in relation to proposals put forward by the appointed delivery team in relation to design, changes / variations etc.
 - Evaluate any technical change orders / variations proposed and recommend for completion.
- Attend meetings with the appointed delivery team in addition to meeting with the CA monitoring team.
- Review the proposed designs and challenge these designs to ensure the most cost effective and efficient solution is developed.
- Complete regular site inspections to ensure progress is in compliance with the development agreement / any associated agreements.
- Ensure compliance with any technical obligations of the contract at handover / PC.

- Provide a recommendation for release of any retention / final payments in consultation with the QS.
- Support the operational team in appointing maintenance contractors on completion of the works.
- Operate from and comply with third party document management systems as required to facilitate communication with the delivery team. Upload project documentation on to the LDA documentation management system for record.

1.5 Drawing Deliverables

As a minimum all project drawings will be delivered in 2D using AutoCAD or similar software. Some projects may be required to be delivered using BIM, where the design team are required to design in 3D to facilitate this process this will be defined in the project mini tender. Information manager and BIM Coordination Services are noted as a specialist services in section 1.6.

As noted in section 1.4.1 all teams will be required to use BIM 360 as the common data environment for the project, this platform will be used for all projects regardless of the format of drawing information.

1.6 Specialist Services

Specialist Services to be provided by ALDT and included in mini tenders (as applicable)	Specialist Services to be procured and co-ordinated by the ALDT (including all necessary documentation such as Preliminary Safety, Health & Welfare Plan) and reimbursed by the Contracting Authority (as applicable / non-exhaustive list)
<ul style="list-style-type: none"> • Archaeology Services & Reporting • Building Conservation Report • Arborist Services • Acoustic Consultant Services • Asbestos Specialist Services • Building Surveys (measurement and condition) of existing buildings • Landscaping Visual Impacts Assessment & Graphics (incl. verified views and CGIS) • Wind Modelling & Report • Environmental Assessments and Monitoring (to incl. Mammal Expert, Ornithologist, Ecologist) • Air Quality & Climate Modelling & Monitoring • Background Noise Survey • Sunlight & Daylight Modelling - Impact Studies & Report • Construction & Demolition Waste Management Plan • Operational Waste Management Strategies • GPR Survey 	<ul style="list-style-type: none"> • Archaeology Testing • Test Trenching & Excavation Monitoring • Topographical Surveys • Biodiversity & Ecological Surveys (e.g. Bat & Bird Surveys, Mammals, Invasive Plant Survey) • Ground / Geotechnical Investigations • Utilities Survey • Soil Infiltration Tests • Noise, Dust & Vibration Modelling & Monitoring • Tree Survey & Report • CCTV Survey • Pressure Testing Watermains • Waste Acceptance Criteria Assessment • Traffic Counts • Contaminated Land & Remediation Specialist • Intrusive surveys • Protected Structure fabric sampling and analysis • Asbestos Survey • Planning Application Website

<ul style="list-style-type: none"> • Drainage Records • Water Supply Records • Flood Risk Assessment • Road Safety Audit • Photomontages • Creche report • Schools capacity report (if required) • Information Manager & BIM Coordination Services • Building Energy Modelling • Facade Specialist Services 	<ul style="list-style-type: none"> • Ecological monitoring services, including Ecological Clerk of Works. • Purchase of BIM 360 licences.
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The design team shall advise at the earliest possible stage of any other surveys that may be required for the project and shall scope and procure such surveys in consultation with the client. Such surveys could include the digging of slit trenches, camera surveys etc. It will be the responsibility of the team to source and coordinate these surveys.

1.7 Project Stages

The ALDT will be required to provide all required professional services for Stages (1a) and (1b) up to the issue of the Planning Application, and in the event of services required post lodgement of the planning application, Stages (2) through to (5) of the Conditions of Engagement, in summary:

Stage 1(a): Feasibility, Urban Design / Masterplan, and Outline Design Stage (*up to CA approval of the Feasibility Report*)

Stage 1(b): Preliminary Design and Planning Application Stage (*up to submission of the planning application(s) - additional planning services post lodgement of application will be negotiated (possibly a lump sum) based on tenderers' hourly rates*)

Stage (2): Detailed Design and submission of Statutory applications (*up to issue of the full tender package; to include input to the main contractor pre-qualification process and development of the tender documents*)

Stage (3): Tender Action, Evaluation and Award (*from issue of the full tender documents to contract award*)

Stage (4): Construction Stage (*up to Practical Completion of the final phase*)

Stage (5): Handover Period (*up to fully operational facilities including the completion of all snagging works*)

Further details in relation to the required Consultancy Scope of Services for Stages (1) through to (5) is provided in this document.

The Project Stages may be subject to overlap depending on the circumstances and main contractor procurement and contracting strategy of any Call-Off Contract.

General services are required by all ALDT members for all stages and these include:

- Such services as are reasonable and incidental to the specific services identified below in relation

to each element of the design stage.

- Such services as are reasonable and required to complete each element of the design such that the Project can be completed in accordance with the Project Brief.
- as a reasonable professional consultant would contemplate or infer as being required as part of each element of the services.
- Maintenance of the project risk register.
- Attendance and presentation at project meetings, including:
 - CA meetings
 - Stakeholder meetings
 - Local Authority / Pre-planning / Utility provider consultation meetings
 - ALDT design meetings and workshops
 - Risk workshops
 - Site meetings
 - End of stage project review meetings
 - Lessons learned sessions
- A formal design team report is required on completion of each stage for client approval.

2 Stage 1a – Feasibility, Urban Design / Masterplan & Outline Design Stage

2.1 Architectural Services and Architectural Services – Masterplan and Urban Designer

- Act as the DTL.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief including Sketch Proposals and Cost Analysis to achieve brief in advance of design
- Update and re-issue written project brief
- In consultation with the ALDT, assist the CA's appointed representative(s) to produce a Detailed Project Programme upon appointment setting out how the Project will be delivered within the required time period or by the required delivery date, and maintain this programme throughout the project lifecycle;
- Concept development.
- All liaison with the Masterplan and Urban Designer Architect and production of solutions for the best fit approach to sustainable development and vision while being sensitive to the surrounding environment.
- Assessment of risks in context of urban design and proactively lead on workshops with the ALDT as necessary to assess the mitigation measures to be implemented and progress the implementation of these mitigation measures.
- Advise the CA on any potential considerations with regard to third party engagement (i.e. boundaries, access, wayleaves, etc.) which may exist requiring legal attention.
- Investigate all possible grant schemes/funding support available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
- Make applications for the grant schemes/funding support where relevant on behalf of the CA and administer the applications as so necessary.
- Liaise with the CA / CA's Property Advisors / CA's appointed representative(s) as required to progress site feasibility studies and masterplans.
- In consultation with the CA's professional advisers and project stakeholders to develop the feasibility and possible capacity of the site for the proposed scheme undertake the following:
 - Present a project process plan for the feasibility stage for discussion and approval by the CA.
 - Collect and analyse baseline information.
 - Carry out urban design, landscape, and ecological analysis.
 - Develop a series of design and site layouts options.
 - Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
 - Feasibility testing and development of site capacities.
 - Review alternative design and construction approaches and cost implications.
 - Ensure alignment with CA Strategies.
 - Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
 - Lead, proactively engage and manage the ALDT to review new technologies, innovative design, and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to achieve best practice design and construction solutions where relevant

to the proposed project. Such engagement to include workshops and reporting if required to feed into sustainable and economic feasibility recommendations for the development.

- Input relevant observations and findings into later phasing/design evolutions.
- Master planning, feasibility studies, condition surveys and funding proposal documentation support.
- Condition and sustainability report preparation.
- Survey existing buildings / structures on site to ascertain condition, dimensions, levels etc. or any required information to progress the design (including external survey for landscape design), following which determine scope of works, advise CA on any implications of works and report for CA review/agreement;
- Implement surveys of existing facilities, measured building surveys and prepare all relevant drawings of the existing building and associated infrastructure.
- Review current Statutory Consents, Local Authority area development plans and Authority masterplans in place in relation to the development site(s) to ensure proposals comply and amend/advise as required.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into relevant documentation.
- Advise the CA and the ALDT of all duties and responsibilities arising from the existing, planned and anticipated statutory regulations.
- Consultation on the acquisition of Statutory Approvals including Planning submission, Fire Safety Certification, Disability Access Certification, commuting, landscape, infrastructure, and other development related matters.
- Implement as required meetings with ALDT to gather all information necessary to begin the design process.
- Review outline designs to ensure compliance with obligations and Building Regulations.
- Develop schedule of works necessary to advance the initial phase of the works if required when agreed with the CA in advance - example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main Contractors. The Architect is to carry out the role of Employers Representative for the works.
- If agreed with the CA, develop a scope of works including drawing and specifications for any specialist area of work required to be procured in advance of the main contract to de-risk the site in advance of main contractor tender pricing and to expedite the works beginning onsite in a prompt manner to allow the main Contractor(s) complete the works within the required timescale.
- Provide weekly short form progress reports to CA & the CA's appointed consultants (as relevant) and monthly reports (presented at monthly CA meeting attended by all ALDT members) during this phase.
- Agree the change procedure with the CA and manage / report on same.
- Coordinate CA interface on a continual basis.
- Compile Stage 1a report coordinated with input from all ALDT consultants and obtain CA Approval.

2.2 Mechanical & Electrical Services

- Liaise with DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.

- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL to contribute to a coordinated Detailed Project Programme as required.
- Liaise with DTL to review CA procedures and design standards to ensure adherence.
- Liaise with the DTL and ALDT Members to coordinate design elements.
- Carry-out utility availability desk-top studies.
- Survey and report on existing installation conditions and issue recommendations
- Investigate all possible grant schemes available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
- Make applications for the grant schemes on behalf of the CA and administer the applications as so necessary.
- Advise on technical guidelines, including NZEB compliance.
- Master-planning, feasibility studies, condition surveys and funding proposal documentation support.
- Condition and sustainability report preparation.
- Attend site visits to review existing facilities identified for refurbishment / adaptive re-use as agreed with the CA.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme including the following:
 - Assist with formulation of a project process plan for the feasibility stage and present to the CA for discussion and approval.
 - Collect and analyse baseline information.
 - Assist with urban design analysis and attend workshops, as necessary.
 - Assist with development of a series of design and site layouts options
 - Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
 - Feasibility testing and development of site capacities.
 - Review alternative design and construction approaches and cost implications
 - Ensure alignment with CA Strategies.
 - Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
 - Support the Architect, and other ALDT members, with feasibility strategies for the Project including attendance and participation in workshops, reporting and recommendations.
- Develop outline Electricity, Gas, Water, communication infrastructure in line with the CAs requirements
- Provide cost valuation support to ALDT and value engineering activities
- Advise on cost implications of various options and any alternative design as required.
- Develop a schedule and if necessary, a BOQ for works necessary to advance the initial phase of the works - example: strip out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- Advise on tendering procedures
- Develop a schedule for any specialist area of work required to be procured in advance of the main

contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.

- Input into Stage 1a report, as necessary.

2.3 Quantity Surveyor Services

- Liaise with the CA and appointed consultant team to determine the CA's initial requirements and input into the development of the project brief.
- Review and comment on the preliminary budget approval for the project with respect to the project brief.
- Undertake a site visit (to each site if more than 1no.) and review all existing information, including existing site surveys, draft masterplans, reports, health and safety risk assessment(s):
 - Identify any information gaps that may exist and advise on the commercial impact of same.
 - Advise on additional surveys that may be required and procure surveys on behalf of the CA. Prior approval for all additional work is to be provided by the CA.
- Prepare commercial reports and cost plans as required for presentation to LDA departments / other stakeholders.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.
- Advise on potential procurement options and feasibility of the various options.
- Provide a high-level overview of the commercial constraints within which the ADLT must work and prepare an initial budget estimate from feasibility studies.
- Participate in project meetings including design team meetings to ensure the design progresses in accordance with the budget.
- Participate in and provide cost advice for optioneering exercises.
- Liaise with the Mechanical and Electrical (M&E) Sub Consultant to ensure that cost estimates for M&E are included in cost reports.
- Prepare overall project cost calculation and cash flow projections.
- Prepare a commercial report for inclusion in the Stage 1a Design Report to be issued by the consultant team on completion of the stage. This is to include potential procurement options and associated risks and opportunities for client consideration.

2.4 Civil & Structural Engineering Services

- Liaise with the DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL, contribute to a coordinated Detailed Project Programme as required.
- Liaise with the DTL and ALDT Members to coordinate design elements.
- Carry-out site condition and ground contamination desk-top studies.
- Coordinate and Prepare as required Flood Risk Assessment, Engineering Services Report, Mobility Management Plan, Traffic & Transportation Assessment, Construction & Environmental Management Plan.
- Surveys – progress any required surveys required to progress design including survey & report on

- existing structure & infrastructure
- Attend site visits to review existing facilities identified for refurbishment / adaptive re-use as agreed with the CA.
 - Investigate all possible grant schemes available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
 - Make applications for the grant schemes on behalf of the CA and administer the applications as so necessary.
 - Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
 - Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme including the following:
 - Assist with formulation of a project process plan for the feasibility stage and present to the CA for discussion and approval.
 - Collect and analyse baseline information.
 - Assist with urban design analysis and attend workshops, as necessary.
 - Assist with development of a series of design and site layouts options
 - Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
 - Feasibility testing and development of site capacities.
 - Review alternative design and construction approaches and cost implications
 - Ensure alignment with CA Strategies.
 - Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
 - Support the Architect, and other ALDT members, with feasibility strategies for the Project including attendance and participation in workshops, reporting and recommendations
 - Liaise with DTL to review CA procedures and design standards to ensure adherence.
 - Develop outline structural infrastructure and building opening requirements
 - Audit existing infrastructure, potential strengthening, and replacement requirements
 - Master-planning, feasibility studies, condition surveys and funding proposal documentation support.
 - Condition and sustainability report preparation.
 - Generate options to meet outline requirements
 - Develop outline design drawings and issue to the ALDT in a timely manner
 - Prepare cost estimates for the structural services and issue to Quantity Surveyor & DTL.
 - Draft a strategy for structural infrastructure
 - Advice on compliance with Building Regulations / other statutory requirements
 - Report on existing installations
 - Develop schedule of works as necessary to advance the initial phase of the works - example: strip out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
 - Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
 - Input into Stage 1a report, as necessary.

2.5 Landscape Architectural Services

- Contribute to the development and preparation of Project Brief in consultation with the DTL.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL, contribute to a coordinated Detailed Project Programme as required.
- Contribute to the development of best practice design & construction solutions for successful delivery of affordable permanent occupancy residential units.
- Contribute to the examination and preparation of alternative design solutions, adjustments and design revisions as required to meet the Project brief and budget.
- Assist with urban design analysis and attend workshops, as necessary.
- Contribute to the preparation of a full and complete statement of the CA's functional, aesthetic, and operational requirements for the Project.
- Advise and assist the DTL / Quantity Surveyor in developing the Project Budget.
- Contribute to preliminary cost estimates and Outline Cost Plan for the project and assessment against the agreed budget.
- Carry out design review with reference to functionality, efficiency, sustainability, commercial liability, economy, whole life costs and suitability for financing, sale, or lease, as may be required.
- Site appraisal and report – Carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- Advise the DTL on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA's requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Contribute to the Scheme Design and general design Specification in accordance with the Project Brief.
- Comply with design production programmes set by the DTL.
- Contribute to pre-planning and any other necessary statutory or regulatory consultation as required.
- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
- Contribute to site investigation process, site surveys and tests, examination of availability of public utilities and associated reports.
- Input into Stage 1a report, as necessary.

2.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended, notwithstanding any inconsistent Contract contents.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and

seek & provide relevant information to inform the decision-making process.

- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Confirm compliance with PSDP duties in respect of this stage.
- Liaise with the DTL and members of the ALDT to ascertain a full understanding of design risk assessments and provide advice as required.
- Assist in preparation of Stage report for CA review.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Site visits as required during this stage.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Provide Health and Safety expertise and input at all stages of the Preliminary design phase of the project
- Compile design risk assessments as required.
- Input into Stage 1a report, as necessary.

2.7 Planning and Environmental Consultancy Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Advise on the appropriate planning strategy for the site taking account of the various elements of works proposed. Manage and coordinate the strategic planning advice and all associated planning documentation required during the feasibility stage of the project.
- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek to provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend workshops as necessary to input into the urban design analysis.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme immediately on appointment setting out how the Project will be delivered within the required time period or by the required delivery date specifically in relation to planning / environmental programme constraints.
- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.
- Advise the DTL on potential project risks.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports.

- Advise the DTL in relation to advance works requirements where applicable.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- Provide a comprehensive Town Planning Evaluation Report to the Design Team which sets out the basic planning principles and parameters within which the design will evolve, and the final design should be structured.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Assist with development of a series of design and site layouts options.
- Appropriate Assessment Report.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Advise on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA's requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Review and advise upon the planning history of the subject site, relevant adjacent sites, and the strategic and statutory planning context. Comment on the project brief and design proposals in the context of the planning constraints and opportunities.
- Assist in preparation of Stage 1a report for CA review

2.8 Traffic & Transport Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend workshops as necessary to assist with urban design analysis.
- Prepare and assist ALDT with formulation of Mobility Management Plans, Traffic & Transportation Assessments, Construction & Environmental Management Plans.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in their occupancy.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports.
- Carry-out (appoint and administer) required surveys and market research as is necessary.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme.

- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.
- Advise the DTL on potential project risks.
- Advise the DTL in relation to advance works requirements where applicable.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- Assist the DTL and participate with consultations to the CA’s professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Assist with development of a series of design and site layouts options
- Advise on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA’s requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Assist in preparation of Stage 1a report for CA review

2.9 Archaeology Consultancy Services

- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Conduct an archaeological desktop study to advise on the archaeological characteristics of the site and associated mitigation measures.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports.
- Advise the DTL in relation to advance works requirements where applicable.
- Carry-out (appoint and administer) required surveys and research as is necessary.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme
- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.

- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Assist in preparation of Stage 1a report for CA review

3 Stage 1b – Preliminary Design and Planning Application Stage

3.1 Architectural Services

- Act as DTL.
- Lead the ALDT consultants' input to updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Utilise appropriate sustainable and environmental design concepts as agreed with the CA.
- Prepare a sustainability report for the development.
- Prepare detailed masterplan for the site(s).
- Liaise with designers to review design progress and to advise to ensure compliance with regulations and obligations.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement.
- Confirm the results of surveys have been considered in the outline design and Planning Application.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design, and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents.
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into outline design drawings and Planning Application.
- Provide planning consultancy and advice throughout the design phase as required.
- In consultation with the ALDT, prepare and collate necessary reports required for Planning Applications.
- Provide information for the preparations of a project cost plan.
- Monitor and Report on Design plans & timelines for participation by ALDT members, CA, and other relevant parties.
- Provide all imagery (3D images and graphics) for Planning Application.
- Provide all necessary preliminary certifications at this point (e.g., Well)
- Provide fortnightly progress reports to CA during this phase
- Ensure the planning application is feasible from a fire safety and disability access design perspective, as necessary.
- Stage 1b progress report to CA prior to issue Planning Application with input from all ALDT consultants and obtain CA Approval:

3.2 Architectural Services – Masterplan and Urban Designer

- Liaise with DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Consult with the ALDT consultants to update / develop proposals throughout this stage to further address the scope of services identified at Stage 1a taking on board, where relevant, engagements with Stakeholders.
- Prepare a design master plan for the development, to include new housing, new open spaces and new community facilities; provide such drawings, 3-D models and views and reports as required to describe the plan; and participate in public display and presentations to the relevant stakeholders.

- Advise on the development and interaction with community facilities (including local retail and leisure etc.).
- Update recommendations, if required, for working with the proposed mix and distribution of tenures on the lands to create a sustainable model going forward.
- Assist and input into the preparation of Planning Application during this stage.
- Advise the CA / lead Architect on any potential considerations with regards third party engagement (i.e. boundaries, access, wayleaves, etc.).
- Carry out required modelling and analysis as necessary for Planning Application.
- Liaise with the project team to update risk assessments in context of masterplan and urban design and attend workshops with the ALDT as necessary to assess and implement mitigation measures.
- Input into the Stage 2b report.

3.3 Mechanical & Electrical Engineering Services

- Continue engagements with utilities providers where necessary to determine existing services to/from the site.
- Identify Electrical, Gas, Water, communications infrastructure, Supply availability, costs etc. and arrange any specialist surveys on services to be carried out – e.g. Vibration isolation, etc.
- Prepare and submit necessary enquiries and applications to utility providers. Advise DTL and CA of any implications. Liaise with Quantity Surveyor to ensure any abnormal costs are reflected in the cost plan.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Build in future flexibility as a critical design factor
- Life cycle cost assessments where appropriate such as heating, energy performance, sustainability, etc.
- Planning and negotiating with supply authorities in connection with the provision and installation of supplies, as necessary.
- Prepare business case studies for alternative options for energy distribution within the development, e.g., centralised versus decentralised systems.
- Prepare all coordinated outline design drawings and documentation for Planning Application
- Provide all required information to the Quantity Surveyor, as necessary.
- Prepare site plans and input into detailed coordinated masterplan for Planning Application.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement
- Confirm the results of surveys have been considered in the Outline design and Planning documents.
- Liaise with adjacent landowners, as necessary.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare BER(s) as required.
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Input as required into Stage 1b reports to the CA.

- Carry out required modelling and analysis as necessary for Planning Application
- Provide all necessary preliminary certifications at this point (e.g., BER)
- Assist the DTL in ensuring the planning application is feasible from a fire safety and disability access perspective, as necessary.
- Demonstrate compliance with Building Regulations / other statutory requirements.

3.4 Quantity Surveyor Services

- Carry out a cost review of the preliminary design. Make recommendations on alternative preliminary design and construction options in respect of costs, including but not limited to appropriateness of construction, economy of construction per building element/key materials and key items to be included in the output specifications.
 - Advise on cost of design team proposals, including effects of site usage, shape of buildings, alternative forms of design and construction as design develops.
 - Assess options for building services design with the M&E sub consultant and advise on costs and life-cycle costing as appropriate.
 - Participate in and provide cost advice for optioneering exercises.
- Prepare an Outline Cost Plan to include all project costs (e.g. Capex cost, FM Services cost and Lifecycle cost if applicable) and prepare associated cash flow forecasts for issue to the Client. This shall present costs at a high level on a site by site basis and aggregate basis (format to be agreed with the Client) and shall show the appropriate VAT rate
- Attend Preliminary Design meeting(s) with the Client to review the preliminary design, planning application and project costings.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.
- Prepare a commercial report for inclusion in the Stage 1b Design Report to be issued by the consultant team on completion of the stage including the recommended procurement strategy.

3.5 Civil & Structural Engineering Services

- Consider relevant reports, data, and information available and arrange surveys of the site as required including a survey of the existing foul and surface water drainage system (at the CA cost).
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Liaise with the CA representative and make sure those relevant and appropriate factors from the end-user's specialist functions are incorporated into the designs
- Build in future flexibility as a critical design factor
- Assess existing structure and site surveys and complete additional surveys as required e.g. vibration, isolation etc.
- Generate relevant data and reports for the ALDT, and review this data against scheme design and report any anomalies to the DTL / CA.
- Prepare detailed masterplan for the site.
- Liaise with adjacent landowners, as necessary.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Advice on compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the outline design and Planning Application.

- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare Construction Management Plan as required by planning application
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Input as required into Stage 1b reports to the CA

3.6 Landscape Architectural Services

- Prepare detailed masterplan for the site.
- Prepare outline sketch design incorporating landscaping layout, accompanied by sections and elevations indicating the general character and massing of the planting. A number of options may need for approval prior to Planning Application.
- Provide all necessary Landscaping Services cost advice to the DTL / Quantity Surveyor.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Revise as necessary the Landscaping documentation as required to meet the Project Brief and Budget following consultation with the ALDT / CA in advance of Planning Application.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the outline design and planning application.
- Support the Architect, and other ALDT members as necessary in the utilisation of best practice construction methods & construction solutions where relevant, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents;
- Prepare Planning Permission application submission documentation and drawings.
- Assist in the planning application, ensure compliance with the planning context to include all associated technical reports as required.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Comply with design production programmes by the ALDT to meet the agreed Programme.
- Attend to consultation and liaison with adjoining owners or interests, as required.
- Input as required into Stage 1b reports to the CA

3.7 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended, notwithstanding any inconsistent Contract contents.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate

factors are incorporated into the Project brief.

- Provide Health and Safety expertise and input at all stages of the design phase of the project
- Compile all necessary design risk assessments.
- Input as required into Stage 1b reports to the CA

3.8 Planning and Environmental Consultancy Services

- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders as required.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Contribute to a project specific sustainability and energy use strategy and satisfies the CAs requirements in a cost-effective manner.
- Collaborate with the ALDT in formulating recommended design solutions for CA approval and subsequent development.
- Contribute to site investigation process, site surveys and tests, examination of availability of public utilities and associated reports.
- Prepare preliminary Environmental Consultancy Services drawings and report. A number of options may need to be examined to satisfy the CA needs, Cost Limits and Planning requirements.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
 - Prepare any documents needed for the planning application which are not specifically identified as being prepared by others including but not limited to any planning policy statement or statement of community involvement if required for the application.
- Appropriate Assessment Screening and if required Natura Impact Statement.
- Ecological Impact Assessment.
- Environmental Impact Assessment Screening for the site, in co-operation with the other ALDT members, a full Environmental Impact Assessment Report (to include all associated surveys and reports).
- Prepare design for Environmental elements.
- Revise as necessary the Environmental Services documentation following a review with the DTL and the CA and submit revisions for approval.
- Coordinate the planning application, ensure compliance with the planning context to include all associated technical reports as required.
- Review drawings and planning application information pre-lodgement to ensure the package is appropriate for the application, from a planning perspective.
- Co-ordinate and lodge planning application including preparation of statutory notices, application form, application fee calculation and planning report.
- Issue a Schedule of Documents for the planning application detailing the specific documents required for the application and associated responsible party.
- Assist DTL in the preparation of a detailed coordinated design programme for this stage.
- Assist in preparation of Stage 1b reports for CA review.
 - Lessons learned sessions
- Ensure all documents formally submitted to Local Authorities are saved to project document management system.

3.9 Traffic & Transport Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in occupancy.
- Prepare preliminary Traffic & Transport Services drawings and report. A number of options may need to be examined to satisfy the CA needs, Cost Limits and Planning requirements (including further Fire Safety and Disability Access requirements).
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Prepare road safety audits as required for the planning application.
- Input into Construction Management Plan as required by planning application
- Provision information to the DTL / Quantity Surveyor, as necessary.
- Assist in preparation of Stage 1b reports for CA review

3.10 Archaeology Consultancy Services

- Contribute to pre-planning, fire safety and any other necessary statutory or regulatory consultations as required.
- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
- Prepare preliminary Archaeology Consultancy Services drawings and report for Planning Application.
- Prepare developed sketch / outline design for Archaeological elements.
- Provide information to the Quantity Surveyor and other Consultants to enable quantification for preparation of cost estimates and Cost Plan.
- Liaise with statutory bodies, as necessary.
- Contribute to the planning application, as necessary.
- Assist in preparation of Stage 1b reports for CA review

4 Stage 2 – Detailed Design and Statutory Approvals

4.1 Architectural Services

- Act as DTL.
- Coordinate the compliance responses to planning conditions once received. Prioritise the “prior to commencement” planning conditions.
- Directly prepare the response to individual planning conditions.
- After reviewing the existing CA data and consulting fully with the CA, complete detailed interior design & finalized space planning layouts.
- Develop detailed design drawings and specifications for tender.
- Utilise appropriate sustainable and environmental design concepts as agreed with the CA.
- Liaise with designers to review design progress and to advise to ensure compliance with regulations and obligations.
- Develop design programme; consider construction and procurement phasing; input into the contracting and procurement strategy.
- Prepare detailed cash flow for the period up to start of construction to include all ALDT fees and associated survey costs.
- Liaise as necessary with adjacent landowners, development partners to obtain all approvals
- Advise on, procure, and administer all necessary site surveys to support the detailed design.
- Oversee the application for all statutory licenses including archaeological, ecological, contamination, asbestos and oversee the associated mitigations.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement.
- Detail and specify fully all elements, including compliance with the requirements of the Building Control (Amendment) Regulations 2014 and the Code of Practice for Inspection and Certifying Building and Works.
- Confirm the results of surveys have been considered in the detailed design.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design, and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents.
- Advise the CA and ALDT of all obligations relating best practice design & construction solutions for successful delivery of affordable permanent occupancy residential units during this stage.
- Prepare and lodge Fire Safety Certification application, Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into detailed design, Statuary Approvals Applications, and tender documentation.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into outline design drawings and Planning Application.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, prepare, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare Additional / Further Information responses, Planning Compliance submission(s) and submit to authorities if required.

- Provide planning consultancy and advice throughout the design phase as required.
- Advise the CA and ALDT of all duties and responsibilities arising from existing planned and anticipated statutory regulations.
- Provide Daylight and Sunlight Analysis.
- Provide information for the preparations of a project cost plan.
- Develop schedule of works necessary, if required, to advance the initial phase of the works- example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- If agreed in advance with the CA, Develop a scope of works including drawing and specifications for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor complete the works within the required timescale.
- Coordinate the work of all ALDT members in drawing up production information for tender documentation to provide a fully documented proposal for the tender evaluation phase.
- Arrange sample finishes presentation for CA sign off
- Prepare and agree with the CA a procurement strategy for the projects – 2 stage restricted procedures (OJEU) to be assumed.
- Produce comprehensive Works Requirements documents including performance specifications with input from the ALDT members.
- Coordinate a structured set of tender documents with all coordinated detailed design drawings and specifications for the works from the ALDT.
- Prepare Preliminary Inspection Plan (PIP) in consultation with the ALDT members in compliance with the Building Control (Amendment) Regulations 2014 and the Code of Practice for Inspection and Certifying Building and Works.
- Oversee the formulation of all tender documents, including Suitability Assessment Questionnaires (SAQ), Requests / Invitations to Tenderers, evaluation criteria, Forms of Tender and associated information documents with input from the ALDT and CA as required, and ensure fully documented proposal for shortlisting (SAQ), tendering and subsequent tender evaluation;
- Input as necessary into main contractor pre-qualification process.
- Advise, procure, and oversee any required enabling works.
- Provide imagery for project promotional material – provision of 3D images and graphics.
- Provide appropriate detail drawings; 1:10; 1:25; 1:50 for proper detailing and analysis
- Provide all necessary detailed certifications at this point (e.g., Well)
- Provide fortnightly progress reports to CA during this phase
- Prepare Stage 2 Report including pre-tender cost plan – present to CA towards the end of stage

4.2 Quantity Surveyor Services

- Prepare a Detailed Cost Plan (format to be agreed with the Client) with reference to the Preliminary Design and all project costs applying a top-down and bottom-up estimating approach. The Detailed Cost Plan is to include the following:
 - Capex costs including, main works (including M&E and ICT), fittings and equipment, external works, off-site works, abnormals, works in connection with Statutory Consents and risk costs
 - Opex costs including operating, maintenance (soft and hard)
 - Lifecycle costs

- Enabling/advance works costs (if any)
- Inflation indices and VAT figure(s)
- Unit rates used are to be substantiated with reference to relevant building rates, benchmark costs/projects, market rates/prices and any other key items and shall be measured, priced, and itemised on an elemental basis. Cost for items, such as furniture, fittings, and equipment (FF&E) (prepared with reference to a detailed matrix) and FM Services shall be itemised and demonstrated with reference to market rates.
- Insurance reinstatement costs
- Cashflow forecasts in respect of the key cost headings and an assumptions report.
- A detailed cost model for each cost heading including:
 - Lifecycle costs (with reference to building element, frequency of replacement, costs etc.)
 - Facilities management costs with reference to service delivery model, staffing costs, contracted services costs etc.)
 - FF&E (itemised with reference to market prices) [potentially where LDA retains ownership in a “Cost Rental” model].
- Maintain and update cost plans to reflect any design changes during the detailed design process. Prepare periodic reports and updated cash flow forecasts as required.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.
- Preparing such final calculations and details relating to the Works as may be required for submission for an independent check by others nominated by the CA.
- Prepare a pretender estimate for CA review prior to tender and advise on future anticipated inflation.
- Finalise the procurement strategy in consultation the PM and key design team members and seek approval of same from the LDA.
- Draft standard tender documents required under public procurement legislation such as Invitation to Tender, Prior Information Notices and liaise with the LDA to finalise and approve.
- Review detailed design and comment on commercial impact of final tender documents / drawings.
- Prepare Pricing Document in appropriate A.R.M. format and any additional procurement documents ready for tender action. This will include all relevant Procurement Documents required for tendering in accordance with Public Procurement Guidelines and all relevant legislation.
 - The Mechanical and Electrical Sub Consultant will provide a pre-tender estimate and detailed measured M&E schedules, in order to ensure that building service installations are incorporated into the detailed Bills of Quantities (BOQ) in accordance with ARM4, Supplement 2 or similar.

4.3 Mechanical & Electrical Engineering Services

- Identify Electrical, Gas, Water, communications infrastructure, Supply availability, costs etc. and arrange any specialist surveys on services to be carried out – e.g. Vibration isolation, etc.
- Apply for all utility connections and maintain a utilities tracker with reports issued to the DTL / CA as required.
- Liaise with the CA representative and make sure that relevant and appropriate requirements for the end user specialist functions are incorporated into the design.
- Build in future flexibility as a critical design factor

- Prepare pre-tender estimate for the building services and issue to quantity surveyor.
- Life cycle cost assessments where appropriate such as heating, energy performance, sustainability, etc.
- Planning and negotiating with supply authorities in connection with the provision and installation of supplies, as necessary.
- Prepare all coordinated detail design drawings and documentation for tender packs
- Prepare all coordinated design / tender drawings and specifications for the works in accordance with the relevant contracts.
- Produce comprehensive Works Requirements documents, all coordinated detailed design drawings and specifications for the works including performance specifications.
- Input to the completion of all tender documents, including Suitability Assessment Questionnaires, Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.
- Input into main contractor pre-qualification process.
- Complete detailed design of all mechanical building services
- Prepare and Complete the detailed design of all Electrical & information communication & technology building services
- Prepare detailed Mechanical & Electrical / Building Services design documents, drawings, and Specifications.
- Provide all required information to the Quantity Surveyor, including detailed measured M&E schedules, in order to ensure that building service installations are incorporated into the detailed Bills of Quantities (BOQ) in accordance with ARM4, Supplement 2 or similar.
- Consider and determine the interface required between building services and the specialist equipment
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement
- Confirm the results of surveys have been considered in the detailed design.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare BER(s) as required.
- Ensure all building layout designs are fully coordinated with M&E design
- Ensure all external areas undergo an underground spatial coordination analysis for pipe and ducting runs including chambers and also surface chamber cover layout design is coordinated within the public realm
- In conjunction with other ALDT Members, prepare Fire Safety Certification application and Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Optimise and provide all anticipated energy consumption data to the DTL and CA.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare Additional / Further Information responses, planning compliance submissions and submit

to authorities if required

- Carry out all modelling, preparation, testing, imaging as necessary to meeting design brief and/or operational requirements of building
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Develop a schedule and if necessary, a BOQ for works necessary to advance the initial phase of the works - example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Provide all necessary detailed certifications at this point (e.g., BER)
- Input as required into Stage 2 reports to the CA.

4.4 Civil & Structural Engineering Services

- Consider relevant reports, data, and information available and arrange surveys of the site as required including a survey of the existing foul and surface water drainage system (at the CA cost).
- Liaise with the CA representative and make sure those relevant and appropriate factors from the end-user's specialist functions are incorporated into the designs
- Build in future flexibility as a critical design factor
- Generate relevant data and reports for the ALDT, and review this data against scheme design and report any anomalies to the DTL / CA.
- Develop detailed design production documents, drawings, and specification from approved outlined proposals in a timely manner to allow the preparation of the tender documents, Bill of Quantities, and pretender cost estimate.
- Prepare detailed design and design calculations for the site.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Advice on compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the detailed design.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare Fire Safety Certification application, Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, prepare, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare all coordinated design / tender drawings and specifications for the works in accordance with the relevant contracts.
- Produce comprehensive Works Requirements documents, all coordinated detailed design drawings and specifications for the works including performance specifications.
- Input to the completion of all tender documents, including Suitability Assessment Questionnaires,

Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.

- Input into the main contractor pre-qualification process.
- Develop schedule of works necessary, if required, to advance the initial phase of the works.
Example: A isolation of existing utilities to facilitate the speedy commencement of works by the main contractor.
- Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Ensure all external areas undergo an underground spatial coordination analysis for pipe and ducting runs including chambers and also surface chamber cover layout design is coordinated within the public realm
- Input as required into Stage 2 reports to the CA.

4.5 Landscape Architectural Services

- Prepare detailed masterplan for the site.
- Prepare outline sketch design incorporating landscaping layout to a scale of not less than 1:200 illustrating how it is proposed to provide the areas set out in the Project brief. The plans shall be accompanied by sections and elevations indicating the general character and massing of the planting. A number of options may need to be examined to satisfy the CA requirements, cost limits and planning, fire safety, disability access and health and safety requirements. The design must be reconciled with the brief requirements. Submit outline sketch design to CA.
- Participate with the ALDT and other consultants in value engineering and life cycle costing exercises.
- In consultation with the Quantity Surveyor provide all necessary Landscaping Services cost advice, investigation, and support to the ALDT including examination of alternative designs, adjustments, and revisions to meet the Project Brief and Budget. Prepare costings for landscaping design options or alternative designs as required.
- Arrange for a detailed review with the DTL of the Landscape drawings and specifications, and formally confirm that they have been prepared in accordance with the Project Brief and that they are consistent with architectural drawings.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the detailed design.
- Support the Architect, and other ALDT members as necessary in the utilisation of best practice construction methods & construction solutions where relevant, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents;
- Prepare required drawings and documents for input with Fire Safety Certification & Disability Accessibility Certificate applications
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Respond where required to Additional / Further Information requests, planning appeal process if

applicable, and assessment and compliance with planning conditions (if required).

- Comply with design production programmes by the ALDT to meet the agreed Programme.
- Carry out whole life cost assessments as required in consultation with the Quantity Surveyor.
- Prepare detailed specification documentation for the works, including samples, testing, prototype, and QA procedures, with particular regard to sustainability, quality and standards required.
- Assist the DTL in the preparation of a report on the Detailed Design addressing all aspects of the developed design in an integrated manner in relation to the Project Brief, key stakeholder requirements, accommodation, and budget. Assist in a full design briefing to the CA.
- Conduct design review with reference to functionality, efficiency, sustainability, commercial viability, economy, whole life costs as may be required.
- Produce comprehensive works requirements documents, all coordinated detailed design drawings and specifications for the works.
- Input to the completion of all tender documents, including Suitability Assessment Questionnaires, Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.
- Prepare and complete Works' Contract production information including detailed Specialists' design for tender documentation, tender drawings, specifications, and Forms of Tender to provide a fully documented proposal for tendering and subsequent tender evaluation.
- Input as required into Stage 2 reports to the CA

4.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Provide Health and Safety expertise and input at all stages of the design phase of the project
- Compile design risk assessments from the relevant ALDT members.
- Issue a preliminary H&S plan to form part of the tender documentation.
- Assist in preparation of Stage 2 report for CA review.

4.7 Planning and Environmental Consultancy Services

- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders as required.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Prepare design for Environmental elements.
- Revise as necessary the Environmental Services documentation following a review with the DTL and the CA and submit revisions for approval.
- Review on an on-going basis the design to ensure that it is compatible with the requirements of the Planning Authority.
- Prepare Planning Compliance submission(s) and submit to authorities.
 - Provide the Client with a report on the conditions attached to any consent if required

- Agree with the Client and other Consultants a programme for the submission of information to discharge the conditions.
- Agree the discharge of conditions with the Local Authority.
- Advise on, prepare, and respond where required to Additional / Further Information requests, planning appeal process if required. Preparation of First party Appeal against (i) conditions or (ii) Refusal of Permission (if relevant) or First Party Response to Third Party Appeals (if relevant).
- Co-ordination of a unified response on all relevant planning conditions in the event of grant of planning permission issuing from the local authority which requires compliance and further negotiations with the local authority.
- Carry out whole life cost assessments as required in consultation with the Quantity Surveyor.
- Contribute to the risk management strategy and risk register.
- Assist DTL in the preparation of a detailed coordinated design programme for this stage.
- Advise on the need for any Specialists and associated cost factors.
- Coordinate the provision of necessary information to the DTL / Quantity Surveyor for the developed cost plan report.
- Advise upon, procure, and oversee all necessary surveys, on site measures & mitigations including statutory license applications. Provide timely advice on timelines to the DTL and CA.
- Produce comprehensive input to the works requirements documents, including all associated detailed design drawings and specifications for the works.
- Assist in preparation of Stage 2 reports for CA review

4.8 Traffic & Transport Services

- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in occupancy.
- Advise on the need for any Specialists and associated cost factors.
- Advise on the need for any Specialist contractors and associated cost factors, carry out and/ or coordinate detailed design for Specialist works.
- Coordinate the provision of necessary information to the DTL / Quantity Surveyor for the developed cost plan report.
- Produce comprehensive input to the works requirements documents, including all associated detailed design drawings and specifications for the works.
- Contribute to cost plan and pre-tender cost estimate for the project and assessment against the agreed budget with DTL & the Quantity Surveyor.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Assist in preparation of Stage 2 reports for CA review

4.9 Archaeology Consultancy Services

- Contribute to the Scheme Design and general design Specification in accordance with the Project Brief.
- Carry-out on-site mitigation and monitoring, if required, as required, and formulate report upon completion, Includes all statutory license applications
- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
- Revise as necessary the Archaeological documentation following a review with the DTL and the CA

and submit revisions for approval.

- Carry out examination and preparation of alternative design solutions, adjustments and design revisions as required to meet the Project Brief and Budget.
- Provide information to the Quantity Surveyor and other Consultants to enable quantification for preparation of cost estimates and Cost Plan.
- Assist the ALDT in the assessment and compliance with the conditions of final grant of planning permission, to include all associated technical reports as required.
- Assist the ALDT with responding, if required, to Additional / Further Information requests, planning appeal process if applicable.
- Assist in the preparation of a procurement strategy for the project with the DTL.
- Input to works requirements documents, all coordinated detailed design drawings and specifications for the works.
- Assist in preparation of Stage 2 reports for CA review

4.10 Assigned Certifier

- Prepare a preliminary inspection plan for issue with the tender documents.
- Prepare a Compliance Appraisal Record spread sheet that will identify the Certifier/Inspection Interface between Designers and the various parts of the Building Regulations as scheduled in the Code of Practice. This document should clearly identify the roles and responsibilities for certification, ancillary certification and submission at commencement notice stage

4.11 Design and Ancillary Certifier(s)

- Engage with the Assigned Certifier to develop the Compliance Appraisal Record.
- Prepare a risk assessment of specific elements to be identified in the Preliminary Inspection Plan and a compliance document for inclusion with the Tender Documents demonstrating that all aspects of the Building Regulations to which an Ancillary Certificate relates have been considered. The appraisal will serve as a preliminary assessment of compliance with the Building Regulations and will be coordinated with other Ancillary Certifier members of the Design Team by the Design Certifier

5 Stage 3 – Tender Action, Evaluation, Award

5.1 Architectural Services

- Act as DTL.
- Carry out all necessary actions leading to award of contracts.
- Prepare tender documents for main works and specialist works where appropriate
- Assess and advise on any requirements for site monitoring.
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Prepare Stage 3 report.

5.2 Mechanical & Electrical Engineering Services

- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Prepare tender documents for specialist(s) where appropriate.
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.3 Quantity Surveying Services

- Liaise with the LDA, PM and key members of the ALDT to define the technical evaluation criteria and award of marks.
- In conjunction with the LDA's advisers:
 - Advise on the use and/or amendment of the standard forms of building contract and contribute to drafting of particular client requirements
 - Confirm general insurance responsibilities for the Project and comment on the commercial impact,
 - Advise on bonds for performance and other purposes,

- Advise on the need for collateral warranties.
- Attend Tender Documents Review meeting with the Client to finalise the draft tender documents.
 - Finalise draft tender documents, incorporating any amendments identified at the Tender Documents Review meeting.
 - Review final draft tender documents prior to ITT issue.
 - Take instruction from the Employer prior to going to tender.
 - Provide documents in hard copy for the CA, if required.
- Tender:
 - Review and prepare draft responses to all PQQ queries received from potential candidates. Liaise with project team members, the LDA and key stakeholders to seek input where required.
 - Assist and provide input to any clarifications to be raised with potential candidates.
 - Review and comment on the pre-qualification submission and advise on shortlisting prospective tenderers as required.
 - Support the LDA project team, including procurement team in issuing the tender to the market.
 - Attend interviews with selected tenderers.
 - Check tender submissions for accuracy, level of pricing, pricing policy etc.
 - Advise on errors and qualifications in the tenders and, if necessary, negotiate thereon.
 - Prepare a draft Tender Cost Report (format to be agreed with the Client) that includes:
 - detailed analysis, with accompanying commentary and opinion, of the costs submitted by tenderers.
 - details in respect of each cost headings including: Capex, FM Costs, and Lifecycle Costs (where applicable).
 - Professional report – executive summary, background, exclusions etc.
 - Review financial budget in view of tenders received and prepare revised cash flow.
 - Allow for Client review and incorporating Client feedback in respect of the Tender Technical Cost Report.
 - Chair a Tender Review meeting with the Client to review the draft Tender Cost Report.
 - Finalise Tender Cost Report, incorporating any amendments identified at the Tender Cost meeting and issue to Client.
- Attend pre-contract meetings with preferred tenderers to review any items the Contractor may be required to provide prior to contract signing. Review proposed programme for the Works and negotiate on behalf of the CA as required.
- Advise on any matters relevant to recommendation and appointment of the Contractor.
- Prepare any additional information necessary for the information of the Contractor to enable them to carry out the Works. This may include updates on Pricing Documents due to queries during tender process.
- Take instruction from the Employer regarding the award of the tenders.
- Draft letters for issue to unsuccessful tenders if required.
- Provide the Architect/ER/ Employer with the required documentation for contract signing, when requested.
- Coordinate and advise on any matters relevant to recommendation and appointment of the Contractor, including identification of possible cost savings required to maintain the Employer's budget.

- Preparing any additional information necessary for the information of the Contractors to enable him to carry out the Works. This may include updates on Pricing Documents due to queries during tender process.

5.4 Civil & Structural Engineering Services

- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Prepare tender documents for specialist(s) where appropriate.
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.5 Landscape Architectural Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013.
- Confirm compliance with PSDP duties in respect of this stage,
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Input to evaluation of contractors in relation to Health & Safety and site-specific design risks, risk assessments, construction methods statements, programme, etc.
- Evaluate the submissions received from contractors with respect to PSCS capacity & capabilities
- Review successful contractor's H&S plan to form part of the contract documentation
- Ensure appointment made in respect of Project Supervisor for the Construction Stage (PSCS)
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.7 Planning and Environmental Consultancy Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.8 Traffic & Transport Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.9 Archaeology Consultancy Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

6 Stage 4 – Construction

6.1 Architectural Services

- Act as DTL.
- Act as Employer's Representative.
- As Employer's Representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Take instructions from CA and obtain CA approvals on all occasions.
- Administer contract in a timely manner mitigating risk of future contractor claims
- Attend site to keep all relevant facts and documents in administrating claims and realistic account of actual progress and resources against contract and tender programmes
- Ensure contractor and site progress is achieved, design co-operation to avoid disputes (e.g. processing valid alternate proposals for submittals/works execution etc.)
- Support project construction and provide detailed drawings or clarification as required
- Review all contract & specialist design to ensure appropriate detailing is in place prior to construction. Attend all meetings and factory visits to ensure same.
- Update finishes board and obtain CA approval.
- Examine shop fabrication drawings prepared by the Contractor's Sub-contractor, Specialists, or suppliers for the works.
- During the construction phase the Architect must review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Design details to achieve the performance outlined in the tender requirements – Request/Approve/Reject samples/submittals/mock-ups in a timely manner.
- Advise in relation to application of Liquidated Damages
- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the main contractor(s) and the rest of the ALDT
- Attend and issue notes on site walks and visits (minimum weekly)
- Chair monthly CA meeting with the rest of the ALDT
- Assist in the provision of monthly progress report to CA during this phase
- Issue a Draft building commissioning report prior to handover
- Issue Quality Check Sheets and Observe and report progress addressing same
- Liaise with site monitoring staff to ensure all works are being carried out to drawing and specification
- Request and examine collateral warranties for relevant specialist works
- Provide all necessary copies of drawings and specifications for the contract documents
- Perform the duties of Design Certifier under the Building Control (Amendment) Regulations 2014 and sign the Design Certificate in accordance with those Regulations. This will include but is not limited to:
 - Provide all necessary plans, specifications and documentation required for lodgement at commencement stage in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.
 - Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or

test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.

- Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Assigned Certifier's Implementation Plan.
- At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
- Provide the Design Certifier Certificates.
- Clearly define areas of responsibility for certification of compliance of the design.
- In conjunction with the Assigned Certifier review the Builder's project programme for coordination with the Preliminary Inspection Plan.
- During the construction stage clearly define the inspection methodology and undertake individual inspections in accordance with the agreed inspection plan. Provide inspection reports in a format agreed with the Assigned Certifier.
- Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role. As lead designer ensure information is provided by other disciplines as required.
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014.
- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government's "Code of Practice for Inspection and Certifying Buildings and Works" (February 2014).
- Attend meetings as required with the Assigned Certifier.
- Assess and advise on any requirements for site monitoring.
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Coordinate and chair all site meeting with the contractor and specialists on site progress
- Manage the construction phase of the project and issue all necessary instruction to the contractor
- Receive and respond to Contractors and/or Specialist's Requests for Information (RFI) providing additional design input and/or clarification where required.
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- Report to CA as required.
- Accept/Reject necessary for achievement of Substantial Completion, report to CA on same.
- Provide certification that the works have reached substantial completion.
- Provide Final Account reports to CA in accordance with the works contract.
- Advise CA in relation to achieving occupation of all or part of the building or early handover prior to issuing Substantial Completion.

- Complete final as built accessibility and fire safety audits and confirm compliance to original plan and regulations.
- Ensure accurate and complete as-built information including all operating manuals is provided to the CA on a timely basis.
- Agree snag list and timing with contractor, other ALDT members and CA.
- Provide monthly progress reports to the CA.
- Prepare Stage 4 Building Commissioning report for each phase that reaches Practical Completion.

Note the person identified as the Employers Representative (ER) will be required to attend all site meeting and site walks. Note all instructions are to be issued in writing through the ER.

6.2 Mechanical & Electrical Engineering Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the contractor(s) and rest of the ALDT
- Attend monthly CA meeting with the rest of the ALDT
- If required, carry out all necessary supervision of the works for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Review contractor and sub-contractor submittals as required to determine approvals or rejection of same.
- Give all necessary advice in a timely manner to the Employers Representative pertaining to services works being carried out to allow the orderly running of the contract
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014. This will include but is not limited to:
 - Provide all necessary plans, specifications and documentation required for submission in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.
 - Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
 - Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.
 - Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Design Certifier and Assigned Certifier's Implementation Plan.
 - At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
 - Provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier.

- Clearly define their area of responsibility for certification of compliance of the design.
- As completion or phased completion approaches on the building, the Ancillary Certifier will witness such tests as required under their remit for demonstrating compliance with the relevant parts of the Building Regulations. The Ancillary Certifier will provide updated documentation if the building as completed is at variance with the documentation submitted at Commencement Notice Stage.
- Provide Ancillary Certificate(s) for design changes after Commencement.
- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government’s “Code of Practice for Inspection and Certifying Buildings and Works” (February 2014).
- Attend all site meetings, site walks and visits
- Assist in the preparation of a Draft Building commissioning Report prior to Hand-over.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Input to Contractors and/or Specialist’s Requests for Information (RFI) responses providing additional design input and/or clarification where required
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer’s Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect’s remedial works upon notification of their completion by the Contractor.
- On request from the Employer’s Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Report to Employers Representative as required

The person identified as the lead/senior project Mechanical and Electrical Consultant will be required to attend all site meetings and walks. The Mechanical and Electrical Consultant may not issue instructions to the contractor. All Instructions must be issued in writing by the Employers Representative.

6.3 Quantity Surveying Services

- Provide cost advice to the Client on an as requested basis in relation to contract variations.
- Complete value engineering assessments / cost comparisons of various elements as required, e.g. external wall options, first floor joist construction, internal partitions versus blockwork walls etc. frame, elevation etc.
- Attend regular meetings with the Contractor and the design team to review progress and cost control and quality of works.
- Provide Inspection Services on a regular basis for Interim Payments, Cost Reports, and monitoring.

- Check materials stored off site as required.
- Prepare recommendations for interim payments to contractors, sub-contractors, and suppliers in accordance with building contract requirements.
- Attend regular meetings with the client with regard to progress and costs and prepare interim reports on same as required.
 - Prepare monthly Cost Reports including updated Cash Flow Expenditure
 - Attend cost review meetings with the CA. Issue minutes of these meetings when chaired by the QS.
- Attend, for the duration of the construction of the Works, the relevant site meetings in order to monitor that the Works are being executed generally in accordance with the contract and instructions given to the Contractor.
 - Attend such additional site visits as are necessary to ensure that certain stages of the works are completed in compliance Contractors claims.
- Attend sufficient regular meetings as required with the Contractor and the design team to review progress and properly administer and deliver a quality project within the required time and within budget.
- Monitor, measure, negotiate and report on all Post Contract variations and/or Client instructed scheme amendments.
 - Manage of all contractor claims, variations, and extras up to the time they are referred to dispute procedures under the contract by either party.
 - Assist the Architect/ER in assessing (preparing reports as required) Change Orders, Extension of Time Request etc as they arise.
- Prepare valuations for partial hand-over if required.
- Assist in adjudicating on any dispute or difference relating to the works which may arise between the Employer and the Contactor. The scope of this engagement shall not extend to advising the Employer following the taking of any step in or towards any arbitration or litigation in connection with the Works.

6.4 Civil & Structural Engineering Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the contractor(s) and rest of the ALDT
- Attend monthly CA meeting with the rest of the ALDT
- If required, carry out all necessary supervision of the works for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Examine and report on any variations and claims, including those resulting from delay / disruption, pertaining to Civil and Structural works being carried out to allow the orderly running of the contract
- Review contractor and sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Assist in the preparation of a Draft Building commissioning Report prior to Hand-over.
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014.

This will include but is not limited to:

- Provide all necessary plans, specifications and documentation required for submission in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.
- Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
- Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.
- Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Design Certifier and Assigned Certifier's Implementation Plan.
- At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
- Provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier.
- Clearly define their area of responsibility for certification of compliance of the design.
- As completion or phased completion approaches on the building, the Ancillary Certifier will witness such tests as required under their remit for demonstrating compliance with the relevant parts of the Building Regulations. The Ancillary Certifier will provide updated documentation if the building as completed is at variance with the documentation submitted at Commencement Notice Stage.
- Provide Ancillary Certificate(s) for design changes after Commencement.
- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government's "Code of Practice for Inspection and Certifying Buildings and Works" (February 2014).
- Attend all site meetings, site walks and visits
- Receive and respond to Contractors and/or Specialist's Requests for Information (RFI) providing additional design input and/or clarification where required
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- On request from the Employer's Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents

- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Report to Employers Representative as required

The person identified as the lead/senior project Civil/Structural Engineer will be required to attend all site meetings and walks. The Civil/Structural Engineer may not issue instructions to the contractor. All Instructions must be issued in writing by the Employers Representative.

6.5 Landscape Architectural Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend site meetings with the contractor the rest of the ALDT as necessary
- Attend CA meeting with the rest of the ALDT as necessary
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- If required, carry out all necessary supervision of the works (Landscaping) for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014 if / as required.
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- On request from the Employer's Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents
- Report to Employers Representative as required

The person identified as the lead/senior project Civil/Structural Engineer will be required to attend all site meetings and walks. The Civil/Structural Engineer may not issue instructions to the contractor. All Instructions must be issued by the Employers Representative.

6.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013.
- Advise and provide all necessary clarification and document to the ALDT to allow the timely progression of construction
- Carry out monthly site inspection of the construction works and issue a report of all finding/observation and concerns
- Monitor the performance of the PSCS and report any findings to the CA.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.

6.7 Planning and Environmental Consultancy Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.8 Traffic & Transport Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.9 Archaeology Consultancy Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.10 Assigned Certifier

- As part of the Inspection plan, and before the commencement of work on site, agree with The Employer and the Contractor an Inspection Notification Framework (INF), taking account of the building works involved and other factors.
- Before signing the form of Undertaking by the Assigned Certifier, exercise reasonable skill, care and diligence in checking that the documentation is appropriate for lodgement with the Commencement Notice.
- Schedule and obtain Ancillary Certificates from others. Coordinate, compile, and schedule relevant information to be submitted to the Building Control Authority as required under the regulations.
- In consultation with the members of the design team, plan and oversee the implementation of the Inspection Plan during Construction. On completion provide the Inspection Plan as implemented.
- Develop and agree wording of all certificates required.
- Co-ordinate and collate all certification of compliance (sub-certificates, ancillary certificates, warranties and tests as set out in the Inspection Plan) including for completion in conjunction with the Builder.
- On termination or relinquishment of appointment make available to the Building Owner all certification prepared and inspection reports carried out.
- Act as the single point of contact with the Building Control Authority during construction, including responding to requests for additional information by the Building Control Authority.
- Seek advice from the Building Control Authority, in respect of compliance matters relating to the building or works where disputes or differences of opinion arise between the parties to the project.
- Coordinate the inspection of the works by themselves and others and to certify the works on completion. Maintain records of inspection.

7 Stage 5 – Handover and Defects Period

7.1 Architectural Services

- Act as DTL
- Oversee snagging process as required, confirm progress to CA on ongoing basis.
- Obtain as-built drawings from the contractor; review and if acceptable transfer full documentation package to CA on CD including as built Architectural, M&E, Civil/Structural and Specialist drawings (else pursue contractor for required revisions/updates).
- Oversee and monitor completion of all post Practical Completion landscaping activities and services.
- Pass on relevant recommendations for the ongoing maintenance and care.
- As Employers Representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Determine any extensions of time under the contract.
- Arrange handover procedure, including final as built drawing issued to the contractor at the construction stage
- Arrange handover of the individual system and manufacturers' manuals and advise on maintenance contracts to enable the CA to operate and maintain the works
- Monitor agreement of the final account and issue report to the CA.
- Ensure snags or other defects which require urgent / immediate attention during the defects period are acted upon and closed-out.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- One month before the end of the defects periods as set out in the construction contracts(s), inspect the site and compile a list of defects in the works and issue a schedule of defects/snags to the CA for review if required, and issue to the Contractor.
- Liaise with contractor for close out all outstanding claims under contract
- Coordinate inspection at the end of the defects period
- Make recommendation on further retention of monies
- Prepare final report for issue to CA including lessons learnt
- Ensure accurate and complete as-built information including all operating manuals is provided to the CA on a timely basis.
- Administer retention period post Practical Completion including
 - Undertake final snagging of projects and close out of same to release final retention
 - Liaise with specialist as necessary to resolve issues

7.2 Mechanical & Electrical Engineering Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.

- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.3 Quantity Surveying Services

- Negotiate and agree Main Contract Final Accounts including all Contractor claims, variations and extras instructed by the Design team.
- Liaison with Design Team and Client on Post Contract Issues.
- Produce a full Final Account Report for the CA.
- Make available relevant, key personnel to the CA in the event of the Controller Auditor General and/or the Public Accounts Committee or other publicly appointed body wishing to discuss the public sector aspects of the procurement.
- Liaise with Contractor and client at the end of the defects liability period to ensure that Final Account / Final Statement is agreed. It is envisaged that the defects liability period will be 15 months.
- Conduct a design review, including Analysis of Outturn Cost and operation risk review, for submission to Employer.

7.4 Civil & Structural Engineering Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.5 Landscape Architectural Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and

report to the CA as required.

- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, notwithstanding any inconsistent Contract contents.
- Liaise with DTL, ALDT members and the contractor in relation to the provision of the Safety File to include Health & Safety risk assessments, Operation & Maintenance files (O&Ms), as-built drawings, detailed technical specifications, Specialist works as-built drawings and specifications, all results of specialist's test or any other tests carried out during the course of the project, Maintenance Specifications or other relevant documentation.
- The Safety File should include all relevant information to enable the building to be occupied and maintained safely and future changes to be made with full knowledge of the hazards and risks. Where appropriate it should incorporate details of the building, or the mechanical and electrical services systems, manufacturers' operational instructions, supplier references, checklists, test certificates and other maintenance details.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- The Employer's Representative should check with the PSDP before issuing the Substantial Completion Certificate. All substantive elements (sufficient to allow safe occupation of the building) of the Safety File should be complete before Substantial Completion, and any supplementary information must be in place within three months of that date.
- Where substantive elements of the Safety File are incomplete due to the failure of the Contractor or Project Supervisor (Construction Stage) to cooperate or provide the requisite information, the PSDP should so advise the Employer's Representative who should not issue Substantial Completion until the relevant information is provided.

7.7 Planning and Environmental Consultancy Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.8 Assigned Certifier

- At completion stage, submit the following to the Building Control Authority:
 - Certificate of Compliance on Completion signed by the Builder (at Part A) and by the Assigned Certifier (at Part B)
 - Plans, calculations, specifications and, showing how the completed building has achieved compliance with the Building Regulations must be lodged on the Building Control Management System when the Certificate of Compliance on Completion is submitted or at an earlier date. Where design documents have changed or supersede design documents previously lodged with the Building Control Authority with the Commencement Notice or later, any such difference should be clearly identified
 - The Inspection Plan as implemented by the Assigned Certifier in accordance with this Code of Practice.

7.9 Multi-Disciplinary Services on Handover

7.9.1 Final Account Report

- After receipt of the Final Statement the Final Account must be agreed and the Employer's Representative shall issue to the Client a Final Account Report including a Quantity Surveyor's Report. Timelines for this activity are to be agreed on a project by project basis.
- The ALDT, PM and QS recommendation for payment of the adjusted Contract Sum must be detailed in this report with the following appendices:
 - The summary section only of the Draft Final Account.
 - Quantity Surveyor's Final Account Report.
 - Written Confirmation from the Project Supervisor Design Process and the Client that the completed Safety File has been handed over to the Client.
 - A copy of the Architect's Opinions on Compliance of the Works with Planning and Development Acts and with the Building Regulations.
 - Copies of all guarantees provided for in the Contract Documents.

7.9.2 Defects Period

- On completion of the Defects Period, the IDT must agree and confirm in writing to the Client that the work is complete, and all defects have been corrected within this period.
- The final certificate can now be issued.
- Phasing may be required subject to the project programme.

7.9.3 Final Account Report Supplement

The ALDT must submit a Final Project Report to the Client on completion of the Defects Period, subject to agreement with the client that all defects have been addressed. This report should include the following Supplement to the Final Account Report:

- The summary section only of the agreed Final Account.
- Written confirmation of both Client and IDT that the work is complete, and all defects have been corrected within the Defects Period.

- The Architect's Report on the Building Works and the Contractor's performance during the Building Contract.
- Civil/Structural Engineer's Report on the civil/structural works and the quality of the work.
- Building Services Engineer's Report on the Mechanical and Electrical Services, and the quality of the Mechanical and Electrical installation

8 General Services for All Stages

8.1 Fire Safety Engineering

- Fire Safety Engineering design services are included in the Design Team for all stages of the project.
- Design Stages:
 - Provide general advice on the need to obtain a Fire Safety Certificate, comply with Building Regulations and with other statutory requirements
 - Provide enough preliminary information in relation to the project in the form of advice, sketch drawings, schematic layouts, reports or outline specifications to enable the lead designer to prepare outline proposals, concept proposals, developed design proposals and detailed design proposals
 - Obtain from and discuss with our other consultants' proposals, designs and outline specifications as to architectural, civil and structural, mechanical and electrical elements and requirements and co-ordinate these requirements with the fire safety engineering solution.
 - In conjunction with our other consultants, assist the architect in the preparation of a Preliminary Design Report and Cost Plan in respect of the final scheme design, illustrating the scheme in scale plans, sections and elevations and specifications in sufficient detail to enable The Client to approve spatial arrangements, materials and appearance, and reporting as to all the above issues required to be dealt with under this work stage.
 - Formally confirm that the architectural drawings are compliant with the fire safety regulations and with your advice and that a fire safety certificate can be obtained based on the architectural layouts.
 - Review the Architectural Design at each design iteration and confirm that the fire safety engineering requirements are incorporated
 - Review the M&E Design at each design iteration and confirm that the fire safety engineering requirements are incorporated in the design document.
 - Review the Civil and Structural Design at each design iteration and confirm that the fire safety engineering requirements are incorporated in the design document.
 - Review of the design proposals and advising on any necessary changes vis-à-vis the achievement of compliance with relevant requirements of Part B (Fire) of the Second Schedule to the Building Regulations.
 - Advising the Architects and other members of the design team on the information required for inclusion with the Fire Safety Certificate Application/Report if required as part of the project.
 - Preparation of fire engineering analysis for those aspects of the design which deviate from the recommendations in the guidance documents.
 - Advise the Design Team of a Fire Strategy dealing with any fire safety engineering aspects of the design, exploring alternative solutions and identifying any possible alternative

- options. This will include fire engineering analysis and modelling of maximum compartment size, fire growth, smoke movement and occupant response.
- Advise the Design Team on detailed design and specification of all items arising from the fire safety requirements of the project. These include, but are not limited to doors, wall construction, ceiling construction, floor coverings, service routes, ducts, alarms, smoke and heat detectors and suitability of building materials generally where they are material to fire safety aspects of the project.
 - Advise the Design Team of specific functions and/or elements of accommodation within the design which affect fire safety e.g. storage of waste, gases, fuels, location of vents, effect of deliveries.
 - Commission Computational Fluid Dynamic studies where required to prove the design proposal.
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Existing means of escape and required alterations – location, number, size, specification of stair cores and access/egress points; travel distances; protected escape routes; phasing proposals.
 - Construction – fire resistance of new structure, compartmentation.
 - Elevations – distance to relevant boundaries and requirements for fire rating elevations if required.
 - Existing Fire Fighting Facilities and required alterations to these– means of fighting fire and the need for hydrants around the site, firefighting access roadways, internal fire mains, testing, maintenance and storage of equipment etc.
 - Active Fire Safety Systems – requirements for smoke control requirements such as venting, emergency lighting, fire detection and alarm etc.
 - Site wide fire safety issues relating to the interaction of the building with other areas of the site.
 - Examining and investigating options for alternative uses within fire strategy.
 - Investigating multi occupancy layouts and use of building in relation to fire strategy.
 - Fire Certificate application and associated process:
 - Consult as necessary with Building Control authorities, the Fire Brigade and statutory undertakers about any matters of principal in connection with the design of the project.
 - Preparation of Fire Safety Certificate Compliance Reports for the building including relevant drawings for submission for an application for a Fire Safety Certificate and other relevant support information, demonstrating compliance with the relevant requirements of Part B (Fire) of the Building Regulations.
 - Consultations / negotiations as necessary with the Building Control Authority during the course of their consideration of the Fire Safety Applications.
 - Duly respond to all requests from the local authority for additional information during the planning application process.

- Produce amended drawings, analysis, modelling and reports in response to RFI, clarifications/modifications, and appeal(s) as required.
 - Preparation of additional information as may be required by the Local Authority Fire Department, including further fire engineering analysis and computer modelling as necessary.
 - Making the applications for Fire Safety Certificates to the relevant local authorities.
 - Produce amended drawings in response to oral hearing information and further information on queries and clarifications if required. Attendance at legal briefings, design team meetings, oral hearing, and preparation of witness statement and any related services.
 - Tender Document
 - Arrange for a detailed review with the Architect and the Client of the Fire Safety Engineering drawings and specifications, and formally confirm that they have been prepared in accordance with the agreed brief and that they are consistent with the architectural drawings.
 - Revise as necessary the Fire Safety Engineering documentation following the above detailed review with the Architect and the Client and submit revisions for Client/ Project Manager Approval.
- Construction
 - The Consultant shall provide further information as is reasonably necessary, in his opinion, to enable contractors and/or sub-contractors to prepare installation drawings.
 - The Fire Safety Engineering designer shall examine installation drawings, shop drawings and builders work details submitted by contractors and/or sub-contractors for the fire safety works or parts thereof to ensure compliance with building regulations, standards and the fire safety certification documentation.
 - The Fire Safety Engineering designer shall advise The Client through the lead consultant on the need for special inspections or tests arising during the construction of the Works.
 - The Consultant shall assist the rest of the professional team in examining Contractors' and/or Sub-contractors' proposals as may be required by contracts for the Works.
 - Assist in providing a response from the design team and advise on the effects of a proposed change to the design of the project, in accordance with the change control procedures.
 - The Fire Safety Engineering designer shall examine the proposals of Contractors or Sub-Contractors for carrying out commissioning procedures and performance testing in relation to the fire safety works. Comment to The Client on any requirements of these proposals affecting the programme for the Works
 - Provide information to, discuss proposals with and co-ordinate your production information with the input of our other consultants and of any relevant specialists.
 - The Fire Safety Engineering designer shall examine the results of commissioning and the documentary records. Inspect the Works on completion and, in conjunction with the professional team, record any defects. Obtain from the Contractor all test and commissioning reports required to verify the correct operation of the systems involved, having witnessed commissioning test where appropriate and commissioning reports and confirm that this work has been completed satisfactorily. Review and approve the certificates for design, installation and commissioning / completion, furnished by others,

- in respect of all fire safety elements e.g. fire stopping, structural fire protection, fire door sets, life safety systems (fire detection and alarm, PA, CCTV, smoke control system etc.).
- Inspect the site as required in the Inspection Plan and issue the corresponding inspection reports recording progress, quality and cost. Monitor that defects identified are being corrected by the contractor.
 - Where necessary advise on the need for any additional inspections and/or tests required. Where appropriate propose recommended suppliers, provide brief and obtain costs for the provision of such additional tests.
 - As appropriate make recommendations for sample-taking and the carrying out of tests of materials and workmanship and examine the conduct and results of such tests whether on or off-site.
 - As appropriate make recommendations for the opening up of work to determine that it is generally in accordance with the Building Contract.
 - Carry out regular visits to the works for the purpose of supervision, monitoring and inspection, to confirm that the fire safety works are being carried out in accordance with the Contract
 - In conjunction with the other consultants, review and comment on Contractors, sub-contractors or Specialists' proposals and programmes for commissioning and performance testing of the works. Where required, witness commissioning and testing.
 - Carry out inspection of the fire safety engineering works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Contract Administrator and Project Manager of all snags and defects identified for issue to the Contractor. Carry out inspection of the remedial works upon notification of their completion by the Contractor.
 - If reasonably requested to do so, inspect materials delivered to Site.
 - If reasonably requested to do so, visit the sites of fabrication and assembly of structural elements to inspect such materials and workmanship before delivery to the Site.
 - Assist in evaluation of any outstanding works still to be completed prior to confirmation of Practical Completion.
 - On request from the Contract Administrator, provide certification that the fire safety engineering works have reached Practical Completion.
 - Preparation & submission of an Opinion of Compliance with the relevant requirements of Part B (Fire) of the Building Regulations.
 - Provide Ancillary Certifier's Certificates on completion to the assigned certifier and the client.
- Handover, Close out and post occupancy Services:
 - Inspect the Works and prepare a snagging report in the period leading up to practical completion of the Works and/or any section thereof under the Building Contract. Confirm to The Client in writing whether any significant items of work exist which may prevent the Works or any such section thereof from satisfying the requirements of practical completion under the Building Contract.
 - Development and control of Fire Safety Management files for premises
 - Development of Fire Safety Management procedures for the premises.
 - Contribute to the timely completion of the 'punch list' items on the project.
 - Attend and contribute to post project evaluation.

- Provide advice and recommendations to the Client in relation to Building Maintenance as it relates to fire safety elements, and the training of the managers and maintenance staff who will be responsible for the operation, safety and maintenance of the new facility. Participate in training and maintenance seminar.
- Provide services required in connection with the Defects Liability Period under the Building Contract and the making good of defects. After Practical Completion and before the end of the defects' liability period, visit site with the Architect/Client to check operation of installations and advise regarding the correction of any operational difficulties that may exist. Issue report on this visit to all parties.
- In conjunction with Other Consultants, monitor the Project Defects Liability Period. Compile a list of defects of work, one month before the end of the Defects Liability Period and issue coordinated Project Team's defects list to the contractor. During Defects Liability Period instruct the Contractor on any urgent defects that require immediate attention.

8.2 Disability Access Engineering

- Disability Access Engineering design services are included in the Design Team for all stages of the project.
- Design Stages:
 - Provide general advice on the need to obtain a Disability Access Certificate, comply with Building Regulations and with other statutory requirements.
 - Advise on the implementation of universal design standards.
 - Provide enough preliminary information in relation to the project in the form of advice, sketch drawings, schematic layouts, reports or outline specifications to enable the lead designer to prepare outline proposals, concept proposals, developed design proposals and detailed design proposals
 - Obtain from and discuss with our other consultants' proposals, designs and outline specifications as to architectural, civil and structural, mechanical and electrical elements and requirements and co-ordinate these requirements with the disability access engineering solution.
 - In conjunction with our other consultants, assist the architect in the preparation of a Preliminary Design Report and Cost Plan in respect of the final scheme design, illustrating the scheme in scale plans, sections and elevations and specifications in sufficient detail to enable The Client to approve spatial arrangements, materials and appearance, and reporting as to all the above issues required to be dealt with under this work stage.
 - Formally confirm that the architectural drawings are compliant with the disability access regulations and with your advice and that a disability access certificate can be obtained based on the architectural layouts.
 - Review the Architectural Design at each design iteration and confirm that the disability access engineering requirements are incorporated. Advise on potential design improvements aligned universal design requirements.
 - Review the M&E Design at each design iteration and confirm that the disability access engineering requirements are incorporated in the design document.
 - Review the Civil and Structural Design at each design iteration and confirm that the disability access engineering requirements are incorporated in the design document.

- Review of the design proposals and advising on any necessary changes vis-à-vis the achievement of compliance with relevant requirements of Part M, Part K and all relevant parts of the Second Schedule to the Building Regulations.
- Advising the Architects and other members of the design team on the information required for inclusion with the Disability Access Certificate Application/Report if required as part of the project.
- Preparation of disability access engineering analysis for those aspects of the design which deviate from the recommendations in the guidance documents.
- Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Existing means of escape and required alterations – location, number, size, specification of stair cores and access/egress points; travel distances; protected escape routes; phasing proposals.
- Disability Access Certificate application and associated process:
 - Consult as necessary with Building Control authorities and statutory undertakers about any matters of principal in connection with the design of the project.
 - Preparation of Disability Access Certificate Compliance Reports for the building including relevant drawings for submission for an application for a Disability Access Certificate and other relevant support information, demonstrating compliance with the relevant requirements of Part M and associated part of the Building Regulations.
 - Consultations / negotiations as necessary with the Building Control Authority during the course of their consideration of the Application.
 - Duly respond to all requests from the local authority for additional information during the planning application process.
 - Produce amended drawings, analysis, modelling and reports in response to RFI, clarifications/modifications, and appeal(s) as required.
 - Preparation of additional information as may be required by the Local, including further analysis as necessary.
 - Making the applications for Disability Access Certificate to the relevant local authorities.
 - Produce amended drawings in response to oral hearing information and further information on queries and clarifications if required. Attendance at legal briefings, design team meetings, oral hearing, and preparation of witness statement and any related services.
- Tender Document
 - Arrange for a detailed review with the Architect and the Client the drawings and specifications, and formally confirm that they have been prepared in accordance with the agreed brief and that they are consistent with the disability access certificate granted.
- Construction
 - The Consultant shall provide further information as is reasonably necessary, in his opinion, to enable contractors and/or sub-contractors to prepare installation drawings.

- The Disability Access Designer shall examine installation drawings, shop drawings and builders work details submitted by contractors and/or sub-contractors for the relevant works or parts thereof to ensure compliance with building regulations, standards and the disable access certification documentation.
- The Disability Access Designer shall advise The Client through the lead consultant on the need for special inspections or tests arising during the construction of the Works.
- The Consultant shall assist the rest of the professional team in examining Contractors' and/or Sub-contractors' proposals as may be required by contracts for the Works.
- Assist in providing a response from the design team and advise on the effects of a proposed change to the design of the project, in accordance with the change control procedures.
- The Disability Access Designer shall examine the proposals of Contractors or Sub-Contractors for carrying out commissioning procedures and performance testing in relation to part M and granted disabled access certificate. Comment to The Client on any requirements of these proposals affecting the programme for the Works.
- Provide information to, discuss proposals with and co-ordinate your production information with the input of our other consultants and of any relevant specialists.
- The Disability Access Designer shall examine the results of commissioning and the documentary records. Inspect the Works on completion and, in conjunction with the professional team, record any defects. Obtain from the Contractor all test and commissioning reports required to verify the correct operation of the systems involved, having witnessed commissioning test where appropriate and commissioning reports and confirm that this work has been completed satisfactorily. Review and approve the certificates for design, installation and commissioning / completion, furnished by others in respect of all disability access elements e.g. disabled refuge calling stations, automated opening devices etc.
- Inspect the site as required in the Inspection Plan and issue the corresponding inspection reports recording progress, quality and cost. Monitor that defects identified are being corrected by the contractor.
- Where necessary advise on the need for any additional inspections and/or tests required. Where appropriate propose recommended suppliers, provide brief and obtain costs for the provision of such additional tests.
- As appropriate make recommendations for sample-taking and the carrying out of tests of materials and workmanship and examine the conduct and results of such tests whether on or off-site.
- As appropriate make recommendations for the opening up of work to determine that it is generally in accordance with the Building Contract.
- Carry out regular visits to the works for the purpose of supervision, monitoring and inspection, to confirm that the relevant works are being carried out in accordance with the Contract
- In conjunction with the other consultants, review and comment on Contractors, sub-contractors or Specialists' proposals and programmes for commissioning and performance testing of the works. Where required, witness commissioning and testing.
- Carry out inspection of the relevant works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Contract Administrator and Project Manager of all snags and defects identified for issue to the Contractor. Carry

out inspection of the remedial works upon notification of their completion by the Contractor.

- If reasonably requested to do so, inspect materials delivered to Site.
- If reasonably requested to do so, visit the sites of fabrication and assembly of structural elements to inspect such materials and workmanship before delivery to the Site.
- Assist in evaluation of any outstanding works still to be completed prior to confirmation of Practical Completion.
- On request from the Contract Administrator, provide certification that the disabled access and Part M works have reached Practical Completion.
- Preparation & submission of an Opinion of Compliance with the relevant requirements of Part M (Access) of the Building Regulations.
- Provide Ancillary Certifier's Certificates on completion to the assigned certifier and the client.
- Handover, Close out and post occupancy Services:
 - Inspect the Works and prepare a snagging report in the period leading up to practical completion of the Works and/or any section thereof under the Building Contract. Confirm to The Client in writing whether any significant items of work exist which may prevent the Works or any such section thereof from satisfying the requirements of practical completion under the Building Contract.
 - Contribute to the timely completion of the 'punch list' items on the project.
 - Attend and contribute to post project evaluation.
 - After hand-over and before the end of the defect' liability period, visit site with the Architect/Client to check operation of installations and advise regarding the correction of any operational difficulties that may exist. Issue report on this visit to all parties.
 - In conjunction with Other Consultants, monitor the Project Defects Liability Period. Compile a list of defects of work, one month before the end of the Defects Liability Period and issue coordinated Project Team's defects list to the contractor. During Defects Liability Period instruct Contractor on any urgent defects, which require immediate attention.
 - At the end of the Defects Period, carry out a final defects' inspection, and on satisfactory completion of all defects, notify the Contract Administrator accordingly.

The LDA reserves the right to terminate the contract at any point throughout the process.



QUALIFICATION QUESTIONNAIRE

Establishment of a multi-party framework agreement for	Architect Led Design Team
Procedure	Restricted
eTenders RFT ID	176810
OJEU Ref	
Issue Date	Tuesday 22 nd September 2020
Closing Date for Queries	Thursday 14 th October 2020 at 17:00
Contact for Queries	Questions and Answers facility on www.etenders.gov.ie
Closing Date / Time for receipt of Completed Questionnaires	Thursday 22 nd October 2020 at 17:00
<i>Please note that information relating to this Qualification Questionnaire, including clarifications and changes, will be published on the Irish Government Procurement Opportunities Portal (www.etenders.gov.ie). Registration is free of charge and there is no charge for documents. Please note that the Contracting Authority cannot accept responsibility for information relayed (or not relayed) via third parties.</i>	



TABLE OF CONTENTS

1. Disclaimer	4
2. Summary	5
3. About the Contracting Authority	6
3.1 The Projects	6
4. Scope of the Framework Agreement	7
4.1 Numbers Admitted to the Framework Agreement.....	8
4.2 Duration of the Framework Agreement.....	8
4.3 Estimated Value of the Framework Agreement.....	8
4.4 Awarding Contracts under the Framework Agreement	8
4.5 Award to Runner Up	9
4.6 Use of the Framework Agreement.....	10
4.7 Specification of Requirements for Initial Contract under the Framework	10
4.7.1 The Tasks.....	10
4.8 Details of Contracts Arising Over Life of Framework Agreement	10
4.9 Award of Project Management Contracts and Design Team Contracts to same Economic Operator	11
5 Instructions to Applicants	12
5.1 General	12
5.2 Applicant Team.....	12
5.3 Consortia	12
5.4 Conflict of Interests	14
5.5 Queries.....	14
5.6 Submission of Applications.....	15
5.7 Closing date for Applications	15
5.8 Completing the Qualification Questionnaire.....	15
5.9 European Single Procurement Document.....	17
5.10 Evaluation of Applications.....	18
5.11 Clarification of Applications.....	18
5.12 Identification of Tender List.....	18
5.13 Freedom of Information Acts	18
5.14 Interference	19
5.15 Inducement to Purchase	19



APPENDIX A: QUALIFICATION QUESTIONNAIRE..... 20



1. Disclaimer

This document issued herewith (“the Document”) is for information only and does not constitute, and shall not be interpreted as, an offer for sale, prospectus, or the basis of a contract.

Applicants are recommended to read the documents thoroughly. While all reasonable steps have been taken to ensure that the information set out in the Document is accurate and up to date, no representation or warranty, express or implied, is or will be made or given in relation to the accuracy or the completeness of any information contained in the Document or otherwise provided by or on behalf of the Contracting Authority (in writing or otherwise) to any interested party or its advisers. No responsibility or liability for any loss or damage arising as a result of reliance on these documents, or for the information contained in these documents or for any omission is or will be accepted by the Contracting Authority or by any of its officers, employees, agents or professional advisers. No officer, employee, agent, or professional adviser of the company has any authority to give or make any representation or warranty, express or implied, in relation to such information. The Contracting Authority’s officers, employees, agents and professional advisers expressly disclaim any and all liability arising out of such documentation or information and any errors or omissions in or from the documents and information.

The Contracting Authority reserves the right to discontinue the procurement process at any time.



2. Summary

Contracting Authority	Land Development Agency
Nature of Procurement	Architect Led Design Team
Type	Services
Procedure	Restricted Procedure
Stage in procedure	<p>This is the first stage of this competitive procedure whereby any interested party may submit a response to this Questionnaire in order to be considered for inclusion on the tender list.</p> <p>Following evaluation, the top eight (8) scoring applicants will be invited to tender, subject to that number meeting the minimum requirements.</p> <p>Following evaluation of that tender, the tenderer having submitted the most economically advantageous tender will be awarded the initial contract and the tenderers having submitted the top five ranking tenders will be admitted to the multi-party framework agreement.</p>
Selection Criteria	As contained in Appendix A to this Document.



3. About the Contracting Authority

The Land Development Agency (LDA), established in September 2018, is a key Government land management initiative.

Its objectives are to:

- Coordinate appropriate State lands for regeneration and development, opening up key sites for housing delivery.
- Driving strategic land assembly, working with both public and private sector land owners.
- Contributing towards the delivery of affordable housing; and
- Become a leading influencer of housing and land management, through research and innovation.

The LDA will be underpinned by grounding legislation and is overseen by an independent board of directors. The Government has committed to providing the LDA with equity capital of up to €1.25 billion.

3.1 The Projects

The LDA are exploring several development projects and strategic development areas including at the following sites:

Pipeline Site	Projected Units
Dyke Road	250
Kilbarry, Cork	3,000
Bricins / Arbour Hill	400
Site 1, Cork Docks	600
Site 2, Cork Docks	400
East Wall, Dublin Port	200
St Teresa's Gardens, Dublin	750
Sandy Road	500
Cherryorchard	1,000
Leinster Region, location undisclosed.	1,500
Leinster Region, location undisclosed.	800
Munster Region, location undisclosed.	200
Leinster Region, location undisclosed.	180
Leinster Region, location undisclosed.	500
Leinster Region, location undisclosed.	2,500
Total	12,780

It should be noted that this list is not exhaustive, and the LDA reserve the right to add or remove projects from this list throughout the duration of the Framework Agreement.



4. Scope of the Framework Agreement

The Contracting Authority proposes to engage in a competitive process for the establishment of a framework agreement for Architect Led Design Team Services.

A framework agreement constitutes a means of establishing overall terms and conditions in accordance with which, for a specified duration, individual contracts may or not be awarded. In the case of a multi-party framework agreement, contracts will be awarded in accordance with the process outlined herein.

It is emphasised that a framework agreement constitutes no guarantee to purchase a specific quantity of supplies or services from a particular economic operator. Indeed, the Contracting Authority reserves the right to operate outside of the framework agreement at its discretion, particularly should it become apparent that doing so would offer greater value for money. Notwithstanding the foregoing, the framework agreement approach has been adopted in order to leverage efficiencies and maximise cost savings over the duration of the framework.

The framework will be delivered in two lots:

- Lot 1 – Architect-led design team framework for a development of projects exceeding 300 units of accommodation (or development equivalent).
- Lot 2 – Architect-led design team framework for a development of projects 300 units of accommodation and less (or development equivalent).

In response to this questionnaire tenderers must confirm their preferred Lot, suppliers will not be permitted on both.

The Architect Led Design Team will comprise

- a) Architectural Services (incl. Design Team Leader, conservation, masterplan & urban design, fire safety design services, disability access design services, employer's representative for the Works Contract and design certifier as defined under the Building Control (Amendment) Regulations 2014).
- b) Civil & Structural Engineering Services
- c) Quantity Surveying Services
- d) Mechanical, Electrical & ICT Engineering Services
- e) Landscape Architectural Services
- f) Project Supervisor for the Design and Construction Process
- g) Planning & Environmental Consultant
- h) Traffic Management Services
- i) Archaeological Services
- j) Other ancillary design and consultancy services as required



The architectural services consultant will be the design team lead and will act as the single point of contractual responsibility, with the remaining key disciplines providing collateral warranties for the benefit of the Contracting Authority.

4.1 Numbers Admitted to the Framework Agreement

The framework agreement will be established as a multi-party framework agreement with five (5) number of operators for each Lot, subject to sufficient numbers meeting the minimum requirements. While Applicants may submit an application/tender for both lots, they will only be appointed to one lot. Applicants must confirm their preferred lot in response to the qualification questionnaire

4.2 Duration of the Framework Agreement

The maximum duration of the framework agreement will be three [3] years subject to satisfactory annual review of performance. This may be extended for one [1] additional year.

For the avoidance of doubt, the Contracting Authority confirms that the period of any contracts awarded under the framework agreement may extend beyond the date of expiry of the agreement.

4.3 Estimated Value of the Framework Agreement

The estimated total value of purchases pursuant to the framework agreement for:

- Lot 1 is in the region of €50m (ex. VAT) over the lifetime of the agreement.
- Lot 2 is in the region of €25m (ex VAT) over the lifetime of the agreement.

It is emphasised, however, that this figure is provided strictly for indicative purposes only as there is no guaranteed expenditure under the framework agreement.

4.4 Awarding Contracts under the Framework Agreement

Individual contracts may be awarded as follows:

(a) A mini-tender competition will be conducted with all firms admitted to the framework agreement for the relevant lot, depending on project size. On each occasion a Request for Tender will be issued detailing the scope of requirements, the award criteria and a closing date and time. As previously noted firms can only be admitted to one lot of the framework and will only be invited to tender for projects within that lot.

(b) In circumstances where a mini tender competition is run between the members of the Framework as described above, and a competition is not successfully concluded, for example, where no tenders are received, or the tenders received are not capable of acceptance for any reason, the Contracting Authority reserves the right to consult any member of the Framework regarding proposals for performing the required Services and to directly award the required Services to such member



where this is the most expedient way to proceed, taking into account any relevant considerations.

(c) In circumstances where any Services required by the Contracting Authority under this Agreement comprise (a) the repetition of similar Services (i.e. that is services relating to the same project) previously performed for the Contracting Authority by a member of the Framework, or (b) an amendment or termination of arrangements in respect of which a member of the Framework previously advised or provided Services, the Contracting Authority reserves the right to directly award the required Services to such member where this is the most expedient way to proceed, taking into account any relevant considerations such as the need to ensure continuity of the services and affordability.

(d) The Contracting Authority reserves the right to directly award Services to any member of the Framework, within the relevant lot, if it considers it necessary to do so in respect of particular matters, having regard to timing, availability and expertise of resources, conflicts of interest and such other criteria as it considers relevant to such matters.

(e) The Contracting Authority may, from time to time, obtain specific specialist services, up to a value of €25,000, that are covered by this Framework directly from one of the firms admitted to the framework agreement in accordance with Recital 61 of Directive 2014/24/EU.

(f) Within each separate Lot there will also be an allowance for a cascading (rotational) framework for work up to a value of €50,000. This work may include but is not limited to due diligence, feasibility studies, site assessment, block planning for site evaluation purposes etc. This will be a five party rotational arrangement with all framework members with the first appointment to go to the top ranked member, second appointment to the second placed and so on to the fifth ranked. Candidates on the panel who are consistently unable to undertake the works or fail on the pre-set KPI targets may be removed from the panel.

(g) The Contracting Authority reserves the right to amalgamate sites to form a single project for mini-tender competition where efficiencies can be gained and this is deemed advantageous to the LDA, for example, due to scope, programme, location etc.

4.5 Award to Runner Up

If for any reason, it is not possible to establish the framework agreement or award the initial contract to the designated successful tenderer emerging from this competitive process; the Contracting Authority reserves the right to establish the framework with



the next highest scoring tenderer based on the terms advertised at any time during the tender validity period. This shall be without prejudice to the right of the Contracting Authority to cancel this competitive process and/or initiate a new contract award procedure at its sole discretion.

Likewise, if having awarded a contract under the framework, the Framework Member cannot, for whatever reason, deliver the required services to the satisfaction of the Contracting Authority; the Contracting Authority reserves the right to terminate the contract and their membership of the framework and to award the contract and framework membership by mutual agreement to the next highest-ranked tenderer on foot of the original procedure based on the terms advertised, at any time during the framework agreement tender validity period. This shall be without prejudice to the right of the Contracting Authority to cancel this competitive process and/or initiate a new contract award procedure at its sole discretion.

4.6 Use of the Framework Agreement

The Contracting Authority will use this framework agreement as and when requirements within its scope arise. However, there is no obligation upon the Contracting Authority to make use of this framework agreement. Notwithstanding this fact, the framework agreement may be terminated in accordance with the framework agreement terms and conditions, a draft version which will be appended to the tender document.

4.7 Specification of Requirements for Initial Contract under the Framework

The framework agreement will be established on foot of a competition for an initial contract, yet to be determined.

The initial contract will be awarded to the top scoring tenderer, for the relevant Lot, shortly after the formal establishment of the framework agreement.

4.7.1 The Tasks

The Design Team will provide a comprehensive range of services, including but not limited to: feasibility studies, master-planning services, new build residential projects delivered through traditional contracts, new build residential projects delivered via design & build contracts, area regeneration projects, residential retro-fit/refurbishment projects, conservation projects & works to protected structures, small works, public realm and precinct improvements, public buildings, technical due diligence services etc.

4.8 Details of Contracts Arising Over Life of Framework Agreement

The Contracting Authority intend to appoint a Design Team to provide similar services for each project under their remit over the lifetime of the Framework.



4.9 Award of Project Management Contracts and Design Team Contracts to same Economic Operator

It is anticipated that the Contracting Authority will separately procure Project Management Services, Assigned Certifier and Property Advisory Services to act on their behalf.

For avoidance of doubt, companies may be appointed to both Frameworks, but where a successful tenderer is appointed as Design Team to a specific project, no member of their team will be permitted to be appointed as Project Manager to that project.



5 Instructions to Applicants

Every effort has been made to ensure that this Document contains all the necessary information for the completion of applications. The Contracting Authority does not warrant or represent that this Document, or any other information given to Applicants, is accurate or complete. No liability is accepted for any error, misstatement, or omission (negligent or otherwise) in this Document, or in any other information given to Applicants.

5.1 General

The Economic Operator submitting a PQQ Submission is referred to as the Applicant, regardless of whether it is a single company or organisation or a Consortium. The Applicant, if successful in being appointed to the Framework Agreement, will take contractual and organisational responsibility for delivering any resulting Contracts awarded.

5.2 Applicant Team

The Applicant must include the following disciplines within its team, evidence with respect to capacity will be assessed at this stage:

- a) Architectural Services (incl. Design Team Leader, conservation, masterplan & urban design, fire safety design services, disability access design services, employer's representative for the Works Contract and design certifier as defined under the Building Control (Amendment) Regulations 2014).
- b) Quantity Surveying Services
- c) Civil & Structural Engineering Services
- d) Mechanical, Electrical & ICT Engineering Services
- e) Planning & Environmental Consultant,

The Applicant must also include the following disciplines within its team, declarations with respect to capacity will be acceptable at this stage:

- f) Landscape Architectural Services,
- g) Visual Impact Assessment & Graphics,
- h) Project Supervisor for the Design and Construction Process,
- i) Traffic Management Services,
- j) Archaeological Services,
- k) Acoustic consultant services,
- l) Topographical and measured building surveys of existing buildings,
- m) Other ancillary design and consultancy services as required

5.3 Consortia

The Applicant can provide the role of any or all disciplines from within its own resources or by using Sub-Contractors. However, information in relation to all Sub-Contractors must be provided as requested in the PQQ. Where an Applicant lists more



than one entity for one of the disciplines listed above, the Applicant must identify the lead entity for that role in Question A1.2.

The Contracting Authority will require the successful Tenderer to structure itself so that the following legal and organisational requirements are met:

- (a) the successful Tenderer is the single point of contact that takes direct contractual responsibility for interfacing with the Contracting Authority in managing and delivering the Contract, and
- (b) the legal obligations and liabilities of the successful Tenderer are borne by the Economic Operator(s) which satisfy the financial and economic requirements referred to in this Document.
- (c) all Consortium Members must provide joint and several liability to the Contracting Authority for the performance and fulfilment of the terms of the Contract

If there is a change to the Applicant's Team following the date for PQQ Submission and prior to the submission of the Tender, it must seek prior written approval for any change from the Contracting Authority by:

- (a) explaining in writing to the Contracting Authority the reasons for any change; and
- (b) providing full details of any proposed replacement (which will entail the completion of the relevant PQQ questions (if applicable) and the score awarded must be equal to or higher than that attained by the Consortium Member/Other Entity/Sub-Contractor being replaced)

The Contracting Authority will consider a request for approval of such changes only if it is received at least 21 calendar days prior to the relevant submission deadline

Applicants should note that, for any proposed change to their Applicant's Team to be considered by the Contracting Authority, it must be supported by robust reasoning and any replacement must be assessed by the Contracting Authority as being at least equal, in all respects, to the team member being replaced. The decision on whether or not to allow a change in the Applicants Team is a matter for the sole discretion of the Contracting Authority.

Prior to the commencement of the Framework Agreement, the successful Tenderer will be required to notify the Contracting Authority of the name, contact details and legal representatives of all its Sub-Contractors involved in the delivery of the Project, in so far as is known to the successful Tenderer at the time. The successful Tenderer will also be required to notify the Contracting Authority of any changes to the information provided in respect of its Sub-Contractors during the course of the Contract and the name, contact details and legal representatives of any new Sub-



Contractors which the successful Tenderer subsequently involves in the delivery of the Project

5.4 Conflict of Interests

The Contracting Authority recognises that an adviser, Sub-Contractor, consultant, funder, servant or agent to an Applicant or a Consortium Member may seek to participate in, advise or carry out work in relation to more than one bidding team for this Framework. Any adviser, Sub-Contractor, consultant, funder, servant or agent seeking to participate on more than one bidding team, prior to agreeing to any involvement with another bidding team, must receive written approval from the Contracting Authority permitting such involvement (including, inter alia, any conditions attached to such involvement).

If a member of an Applicants' Team is likely to have knowledge of the price or other aspects of the Applicants' tender that could cause it to have a conflict of interest and give rise to a risk of collusion if it also participated in another Applicants' team. If an Economic Operator is considering participating in this way, it must put in place appropriate safeguards to ensure that there is no conflict of interest or collusion in relation to this Procurement Process.

All members of the Applicant's Team must provide a conflict of interest declaration in A8. The Contracting Authority reserves the right to request evidence of such safeguards and/or to decide that an Economic Operator has not put in place sufficient safeguards and therefore is not permitted to participate further in the Procurement Process.

5.5 Queries

Requests for additional information and clarification on any matters must be made via the Questions and Answers facility on www.etenders.gov.ie. All clarifications/additional information will be issued via the etenders website (www.etenders.gov.ie) and will be made available to all potential Applicants who have noted their interest on the etenders website. Please submit queries as soon as possible.

The closing date for queries	Is 17:00hrs, Thursday 15 th October 2020.
Process for submitting queries	Via www.etenders.gov.ie only

In circulating responses, queries will be edited to avoid disclosing the identity of the querist and will be circulated to all parties who have expressed an interest in the procurement on the eTenders website.



5.6 Submission of Applications

The Contracting Authority is using the tender Postbox facility and applications must be submitted electronically via the etenders postbox facility on www.etenders.gov.ie only. Applicants must ensure that they give sufficient time to upload their response. All applications submitted in soft copy must be compiled such that they can be read immediately using PDF readers.

The Contracting Authority is not responsible for corruption in electronic documents. Applicants must ensure electronic documents are not corrupt.

Applicants should produce their response as TWO SEPERATE FILES, One for the Financial Submission & One for the Quality Submission which is clearly labelled, page numbered and indexed.

5.7 Closing date for Applications

The closing date for Applications	is 17:00hours Thursday 22 nd October 2020.
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Applicants must ensure that they give themselves sufficient time to upload and submit all required documentation before the closing date/time. Applicants should take into account the fact that upload speeds vary. There is a maximum of 2.14 GB for individual files sent to the electronic postbox and a one-hour limit for upload. In order to submit a document to the electronic postbox, please note that you must click "Submit Response". After submitting you can still modify and re-send your response up until response deadline. Applicants should be aware that the 'Submit Response' button will be disabled automatically upon the expiration of the response deadline.

It is the responsibility of the Applicant to ensure that their application is complete and is uploaded by the designated deadline. Applications that are received late or via other means WILL NOT be considered in this public procurement competition

NOTE: It is important to note that only persons who have downloaded and accepted a document can submit and upload. Also please leave sufficient time for upload of documents prior to the deadline as it is not possible to upload any material after this time.

5.8 Completing the Qualification Questionnaire

When completing the Qualification Questionnaire contained in Appendix A to this Document, Applicants should note the following conditions:

All questions must be completed in full and without reference to other documents or other parts of the Qualification Questionnaire.



Each member of the Applicants Design Team must complete the section of the Qualification Questionnaire relevant to their discipline.

All questions should be answered with relevance to the subject matter of this competition. For the avoidance of doubt, it is emphasised that the information requested in the Qualification Questionnaire is aimed solely at determining the suitability and choice of Applicants for entry to the competitive tendering stage. Only at that subsequent tendering stage will the selected tenderers be invited to tender in Application to the specific requirements of the contract in the light of the published award criteria and the Invitation to Tender document.

Where a 'Rule' is associated with a particular question, Applicants must satisfy the requirements of the rule in order to remain eligible for consideration in the competition.

Applicants are permitted to add lines to the pro-forma tables and boxes set out within the Qualification Questionnaire if required.

The Qualification Questionnaire must be completed in English and where copies of original documents are provided in languages other than English or Irish, a complete and accurate English translation should be provided, or the documents will not be considered during the evaluation process.

All financial information should be denominated in euro (€), except where financial information is being provided in a certified or audited supporting document such as a set of financial statements in which case it is sufficient for the information to remain in its original currency.

Failure to provide a sufficient level of detail or to explain adequately any relevant matters may result in such data or information not being taken into account during the evaluation process.

The Contracting Authority seeks to encourage participation on a fair and equal basis by Small and Medium Enterprises ("SME"s) in this Competition. SMEs that believe the scope of this Competition is beyond their technical or business capacity are encouraged, subject to this paragraph, to explore the possibilities of forming relationships with other SMEs or with larger enterprises. Through such relationships they can participate and contribute to the successful implementation of any Services Contracts that may result from this Competition and therefore increase their social and economic benefits.

Larger enterprises are also encouraged, subject to this paragraph, to consider the practical ways that SMEs can be included in their proposals to maximise the social



and economic benefits of any Services Contracts that may result from this Competition.

Where a group of undertakings (in whatever form and regardless of the legal relationship between them) come together to submit an application in response to this Qualification Questionnaire the Contracting Authority will deal with all matters relating to this Competition through the entity who will carry overall responsibility for the performance of the contract only (the "Prime Contractor"), irrespective of whether or not tasks are to be performed by a subcontractor or other consortium member (the "Subcontractor"). The Applicant must clearly and comprehensively set out the name, title, telephone number, postal address, facsimile number and email address of the nominated contact personnel of the Prime Contractor authorised to represent the Applicant and to whom all communications shall be directed and accepted until this Competition has been completed or terminated. Correspondence from any other person (including from any Subcontractor) will NOT be accepted, acknowledged or responded to.

Applicants are reminded that they may rely on the resources of other entities in order to establish the suitability requirements on condition that they can prove to the satisfaction of the Contracting Authority that they will have these resources at their disposal when necessary.

If the application is from a consortium / joint venture Applicants must ensure that all the relevant information is provided and where necessary, provide the information requested separately for each party.

Notwithstanding Section 5.4 above, Applicants are strictly prohibited from discussing any aspect of their Application to the Qualification Questionnaire with other Applicants or otherwise exchanging information or colluding in respect of the project. Any Applicant who fails to comply with this requirement may be disqualified.

The Contracting Authority is not responsible for and will not pay for any expense or cost incurred or loss suffered by an Applicant in the preparation or submission of its Application or otherwise. Further, the Contracting Authority is not responsible for any travel or accommodation costs incurred by the Applicant unless previously agreed in writing by the Contracting Authority. Each Applicant is fully responsible for the entirety of all expenses and/or costs it incurs in the presentation or submission of an Application or in participating in this process and competition.

5.9 European Single Procurement Document

Under the 2014 Directives, suppliers may have compiled an ESPD which will be accepted as evidence of compliance with Section A of the Questionnaire. However, the Contracting Authority requires evidence via completed submission of Section B



relating to Technical Capacity. Mere confirmation **will not be** sufficient under these headings.

Progression to tender stage will be conditional upon identified Applicants providing evidence of self-declared information to the Contracting Authority. Failure to provide appropriate evidence within the required timeframe specified will result in the Applicant being deemed inadmissible for the next stage of the competition.

5.10 Evaluation of Applications

An “Application” means the submission by an Applicant of a completed Qualification Questionnaire including the associated appendices.

Applications will be evaluated strictly on their merits in accordance with the published selection criteria, minimum rules and weightings specified in the Qualification Questionnaire.

5.11 Clarification of Applications

While not being obliged to seek clarifications from Applicants, the Contracting Authority reserves the right, at its absolute discretion, to ask Applicants for clarification or elaboration of their Applications to assist in its evaluation of Applications.

However, it is emphasised that the Contracting Authority will not be obliged to seek clarification where any of the essential pass requirements set out in the Qualification Questionnaire have not been met. Therefore, Applicants should pay particular attention to ensure that their Applications contain all the required information.

5.12 Identification of Tender List

All applications will be evaluated in line with the criteria and rules outlined in Appendix A. Responses will be scored and the top scoring eight (8) will be invited to tender, subject to that number meeting the minimum requirements.

5.13 Freedom of Information Acts

All responses to this Qualification Questionnaire will be treated in confidence and no information contained therein will be communicated to any third party without the written permission of the Applicant except insofar as is specifically required for the consideration and evaluation of the response or as may be required under law, including the Freedom of Information Act 2014, EU and Irish Government Procurement Procedures, or in response to questions, debates or other parliamentary procedures in or of the Oireachtas (the Irish Parliament).

Applicants are asked to consider if any of the information supplied by them in response to this request for tenders should not be disclosed because of its sensitivity. If this is the case, applicants should specify the information that is sensitive and the reasons for its sensitivity. the Contracting Authority cannot guarantee that any information provided by applicants, either in response to this Qualification



Questionnaire or in the course of any contract awarded as a result thereof, will not be released pursuant to the Contracting Authority's obligations under law, including the Freedom of Information Act 2014, EU and Irish Government Procurement Procedures. the Contracting Authority accepts no liability whatsoever in respect of any information provided which is subsequently released or in respect of any consequential damage suffered as a result of such disclosure.

5.14 Interference

Any effort by the Applicant to unduly influence the Contracting Authority, relevant agency personnel or any other relevant persons or bodies in the process of examination, clarification, evaluation and comparison of Applications and in decisions concerning the award of the contract shall have their Application rejected.

In accordance with Section 38 of the Ethics in Public Office Act 1995 any money, gift or other consideration from a person holding or seeking to obtain a contract will be deemed to have been paid or given corruptly unless the contrary is proved.

5.15 Inducement to Purchase

The Contracting Authority shall be entitled to disqualify an Applicant in one of the following circumstances:

- (a) if the Applicant has offered or given or agreed to give to any person any gift or consideration of any kind as an inducement or reward for doing or forbearing to do, or for having done or forborne to do, any action in relation to the obtaining or execution of this contract award procedure or showing or forbearing to show favour or disfavour to any person in relation to this contract award procedure or any other contract award procedure with the Contracting Authority, or
- (b) if like acts have been done by any other person employed by the Applicant or acting on its behalf (whether with or without the knowledge of the Applicant).



APPENDIX A: QUALIFICATION QUESTIONNAIRE

REF	PASS/FAIL CRITERIA	PASS REQUIREMENT
A1	Applicant Summary	Applicants must complete this section. If the Applicant is a grouping, then a separate questionnaire must be completed for each group member.
A2	Tax Compliance	Note: Applicants are required to complete a Self-Declaration Form (A5). Applicants should note that if invited to tender, they will be required to provide the evidence self-declared prior to receipt of invitation to tender. If the Applicant is a grouping, then each member must complete the Self-Declaration Form (A5).
A3	Turnover	
A4	Insurance	
A6	Manpower and Skills	All members of the Applicant's Team must demonstrate access to at least the minimum numbers of skilled personnel stated. Please note that the skills outlined may reside in the same person. Applicants should complete the table (A6) applicable to their discipline.
A7	Minimum Experience	All members of the Applicant's Team must confirm by way of declaration that they have successfully delivered services of a comparable nature and scale to those required by the LDA on three (3) previous occasions within the previous 5 years. The Contracting Authority reserves the right to contact the reference included to verify the information provided. Please note evidence is only required, at this stage from Architectural Services, Civil and Structural Engineering Services, Mechanical, Electrical & ICT Engineering Services and Planning & Environmental Services, as per Section B.1 to B.4 below.
A8	Conflict of Interest	All members of the Applicant's Team must provide a conflict of interest declaration in A8
A9	Declaration of Bona Fides	Applicants must complete, sign and date this Declaration. Non-compliant Applicants under any of the headings will be automatically disqualified. If the Applicant is a grouping, then a separate Declaration must be completed for each group member.



REF	WEIGHTED CRITERIA	MAX POINTS AVAILAB LE	ASSESSMENT	MIN POINTS REQUIRED
B1	Architectural	4,000	<p>Applicants may refer to up to five (5) instances within the last five (5) years which demonstrate that they have successfully delivered architectural services of a comparable nature and scale to those required by the LDA.</p> <p>Please provide one example of both new build and retrofit experience in the residential sector and experience acting as Design Team Lead.</p> <p>The projects referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.</p>	2,000
B2	Quantity Surveying	2,250	<p>Applicants should refer to three (3) instances within the last five (5) years which demonstrate that they have successfully delivered QS services of a comparable nature and scale to those required by the LDA.</p> <p>Please provide one example of both new build and retrofit experience in the residential sector.</p> <p>The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.</p>	1,125
B3	Civil & Structural	2,250	<p>Applicants should refer to three (3) instances within the last five (5) years which demonstrate that they have successfully delivered civil & structural</p>	1,125



			<p>engineering services of a comparable nature and scale to those required by the LDA.</p> <p>Please provide one example of both new build and retrofit experience in the residential sector.</p> <p>The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.</p>	
B4	Mechanical, Electrical & ICT	2,250	<p>Applicants should refer to three (3) instances within the last five (5) years which demonstrate that they have successfully delivered Mechanical, Electrical & ICT services of a comparable nature and scale to those required by the LDA.</p> <p>Please provide one example of both new and retrofit experience in the residential sector.</p> <p>The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.</p>	1,125
B5	Planning & Environmental	1,500	<p>Applicants should refer to three (3) instances within the last five (5) years which demonstrate that they have successfully delivered Planning & Environmental Services of a comparable nature and scale to those required by the LDA for the specific Lot that the tender wishes to be considered.</p> <p>Please provide one example of new build and retrofit experience in the residential</p>	750



			sector and experience liaising with local and national stakeholders as part of the planning process. The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.	
TOTAL		12,250	N/A	6,125

NOTE 1: Tenderers should note that they must achieve a minimum rating of 50% for each of the individual qualitative criteria (B1) to (B5) in order to avoid elimination from the competition.

Qualitative criteria will be scored using the following baseline scoring system:

Score	Meaning	Interpretation
90 – 100%	Outstanding	A very comprehensive response demonstrating extensive understanding offering full assurance to client – fully supported with no reservations.
80 – 89%	Excellent	An excellent response demonstrating excellent understanding offering assurance to client – strongly supported.
70 – 79%	Very good	A very good response demonstrating very good understanding offering assurance to client – fully supported.
60 – 69%	Good	A good response demonstrating good understanding offering assurance to client – well supported.
50 – 59%	Acceptable	An acceptable response demonstrating a minimum understanding offering assurance to client - satisfactorily supported.
Less than 50% is unacceptable		



SECTION A – PASS/FAIL CRITERIA LOT 1
All members of the Applicant Team must complete this Section

A1. APPLICANT SUMMARY				
Weighting: Pass/Fail only				
Pass requirement: Applicants must complete this section.				
Organisation Name				
Role in this Procurement Process				
Contact Name				
Position				
Address				
Telephone Office				
Telephone Mobile				
Email				
Date of establishment, if applicable				
Preferred Framework Lot	Lot 1		Lot 2	
Legal Status, if any <i>(Company (Ltd.), Partnership, Sole Trader, etc.)</i>				
Please confirm if you are an SME (Small and Medium Enterprise) as defined in Commission Recommendation 2003/361/EC	Yes		No	
Definition as per 2003/361/EC <i>The category of micro, small and medium-sized enterprises (SMEs) is made up of enterprises which employ fewer than 250 persons and which have an annual turnover not exceeding EUR 50 million, and/or an annual balance sheet total not exceeding EUR 43 million.</i>				



A1.1: Lead Applicant

Maximum Points: Pass/Fail Only

Pass requirement: Applicants must complete this section.

Please note that each Applicant Team/Consortium Member (if applicable) must complete Questions A2 – A9 (incl)

In addition, the Architect, Civil & Structural Engineer, Mechanical, Electrical & ICT Engineer and Planning & Environmental Consultant must complete Question B1

NOTE: Applicants must carefully read the requirements outlined in Section 5 of this Document in relation to Consortia.

Is the applicant a group of economic operators?

Yes No

If Yes, please provide the following information:

Please enclose an organisational chart with the proposed hierarchical structure of the grouping

Confirm if attached

Yes No

Please describe the commercial and legal relationship amongst its members

If your answer is "Yes", please provide the following information:	Name	Service to be delivered	Confirm Separate Questionnaire enclosed?
Consortium Member #1			
Consortium Member #2			
Consortium Member #3			



A1.2: All Applicants/Design Team

Maximum Points: Pass/Fail Only

Pass requirement: Each Sub-Contractor must hold the relevant accreditation/registration.

Please note that each Design Team Member (if applicable) must complete Questions A2 – A9 (incl)

In addition, the Architect, Civil & Structural Engineer, Mechanical, Engineer & ICT and Planning & Environmental Consultant must complete Question B1 - B4

The Contracting Authority may carry out checks to ensure that Sub-Contractors have the required accreditation/registrations and/or may require Sub-Contractors to provide evidence of such accreditations/registrations prior to award of the Development Agreement

Sub-Contractor:	Requirement	Service to be delivered	Identify Lead/Sub-Contractor
Architectural Services	Is listed on the Register of Architects of the Royal Institute of Architects of Ireland or a Member of the Royal Institute of British Architects (or equivalent)	Yes/No	
Quantity Surveying	Is listed on the Register of the Society of Chartered Surveyors Ireland or accredited by the Royal Institute of Chartered Surveyors (or equivalent)	Yes/No	
Civil & Structural Engineering	Is a Member on the Register of Engineers Ireland or registered with the Engineering Council UK (or equivalent)	Yes/No	
Mechanical, Electrical & ICT Engineering	Is a Member of the Chartered Institute of Building Services Engineers or registered with the Engineering Council UK (or equivalent)	Yes/No	



Planning & Environmental and/or Sustainability Consultant	Is Registered as a member of the Irish Planning Institute or the Royal Town Planning Institute (or equivalent)	Yes/No	
Landscape Architectural Services	Is a Member of the Irish Landscape Institute or a Chartered Member of the UK Landscape Institute (or equivalent)	Yes/No	
Project Supervisor for the Design and Construction Process	Statutory appointment as set out in Safety, Health and Welfare at Work (Construction) Regulations 2013. Member of NEBOSH, IOSH (or equivalent)	Yes/No	
Traffic Management Services	Is a Member on the Register of Engineers Ireland or registered with the Engineering Council UK (or equivalent)	Yes/No	
Archaeological Services Consultant	Is Registered with the National Monuments Service of Ireland	Yes/No	



A2. TAX CLEARANCE CERTIFICATE DECLARED BY SELF-DECLARATION (All Design Team Members)

Weighting: Pass/Fail only

Pass requirement: Applicants and each member of the Applicants Team must complete the self-declaration (A5) providing information regarding their tax compliance.

A3. FINANCIAL CAPACITY DECLARED BY SELF-DECLARATION (Lead Applicant Only)

Weighting: Pass/Fail only

Pass requirement:

- (a) Lot 1: Confirmation that the lead applicant party turnover exceeded €6m during **each** of the last three years or pro-rata if more recently established firms are tendering – however the firm must have been in existence for at least 6 months.
- (b) Lot 2: Confirmation that the lead applicant party turnover exceeded €3m during **each** of the last three years or pro-rata if more recently established firms are tendering – however the firm must have been in existence for at least 6 months.

In addition

- (c) Confirmation of financial standing ensuring the applicant party has the financial capacity to pay its debts identified on the current statement of assets and liabilities as being the debts as they fall due.

Evidence of both statements will be required prior to confirmation on a tender list.

NOTE #1: ~~In the case of an Applicant being a grouping, this condition may be satisfied by the group members as a whole whereby the Lead Applicant can provide 80% of the required turnover allowing the remaining 20% be fulfilled by the group applicants, or whereby full reliance on the lead Applicant, self-declaration / evidence will only be required of the lead.~~ ~~In the case of an Applicant being a grouping, this condition may be satisfied by the group members as a whole, or by reliance on the lead Applicant. Where group members are relying on the lead Applicant's financial capacity then this should equate to 80% of the overall turnover allowing the remain 20% be fulfilled by the remaining applicants, self-declaration / evidence will only be required of the lead.~~

NOTE #2: In the case of firms more recently established evidence of pro-rata turnover will suffice.

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A4. INSURANCES DECLARED BY SELF-DECLARATION (All Design Team Members)

Weighting: Pass/Fail only

Pass requirement: Applicants should complete the self-declaration (A5) providing information regarding the insurances in place and are asked to note that the following levels will be required for the firm(s) being awarded this contract. Evidence of the following insurance levels should be provided as an appendix.

NOTE #1: In the case of an Applicant being a grouping, this condition may be satisfied by the group members as a whole, or by reliance on the lead Applicant. Where group members are relying on the lead Applicant's financial capacity, self-declaration / evidence will only be required of the lead.

Insurance Type	Required Level
Public Liability	€6.5m
Employers Liability	€13m
Professional Indemnity (Lot 1) (on any one claim) This limit is not an annual aggregation	€10m (will be advised on a case by case basis)
Professional Indemnity (Lot 2) (on any one claim) This limit is not an annual aggregation	€6.5m (will be advised on a case by case basis)



A5. SELF DECLARATION OF FINANCIAL INFORMATION			
TAX CLEARANCE (All Design Team Members)			
(A) I confirm and declare having a current and valid Tax Clearance Certificate in place and our tax affairs are in order. The Contracting Authority can verify your tax clearance status through Revenue's online facility at www.ros.ie . To this end, please confirm:			
Do you grant the Contracting Authority permission to verify your tax status online via www.ros.ie ?	Yes		No
Information required using new tax clearance certificate status being adopted in 2018			
Applicant Name			
Applicant PPSN/Tax Reference Number			
Access Number			
OR I confirm that I currently hold a valid paper tax clearance certificate	Registration Number		
	Certificate Number		
OR I confirm that I have applied for a Tax Clearance Certificate details of which will be made available as soon as available.		Yes	
FINANCIAL STANDING (Lead Applicant only)			
I confirm that our turnover exceeded:			
Lot 1: €6m per annum in each of the last three financial years.			
Lot 2: €3m per annum in each of the last three financial years.			
Note: if turnover figures for 2019 are unavailable, please use 2018, 2017 and 2016.			
Financial Year	2019	2018	2017
Turnover	€	€	€
I confirm that I will provide the following promptly on request at any time prior to the tender list being finalised: <ul style="list-style-type: none"> evidence of turnover for the past three financial years 	Yes		
	No		
INSURANCES (All Design Team members)			



(B) I confirm that we have the following insurances in place:				
Insurance Type	Level in Place	Details of Any Excess	Expiry Date	
Employers Liability	€			
Public Liability	€			
Professional Indemnity	€			
AND				
I confirm that if successful, where the levels required under the framework are higher than those currently in our possession, I will be in a position to put the required forms and levels of insurances required in place promptly.		Yes		No
AND				
I confirm that I will provide the following promptly on request at any time prior to the award decision being made: <ul style="list-style-type: none"> evidence of insurances in place or letter from Insurance Broker confirming that the required levels could be put in place if successful 		Yes		No
Please note that the Contracting Authority will seek to verify self-declarations regarding financial capacity prior to next stage of the competition.				
Signed:				
Position:				
Dated:				



A6 MANPOWER AND SKILLS (Architectural)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Principal Architect - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience on projects similar in nature, scale and complexity			1
Senior Architect - a relevant degree or equivalent professional qualification, and - a minimum of 10 years post qualification experience working on projects similar in nature scale and complexity			3
Architect - a relevant degree or equivalent professional qualification, and - a minimum of 7 years post qualification experience			3
Assistant Architect - a relevant degree or equivalent professional qualification, and - a minimum of 5 years post qualification experience			1
Total number of suitably qualified resources.			8



Please attach an organisation chart, clearly identifying all design team disciplines.

Organisation Chart Attached	Yes		No	
Page No. / Appendix No. in our submission				

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Quantity Surveyor)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Director Quantity Surveyor with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Senior Quantity Surveyor with: - a relevant degree or equivalent professional qualification, and - a minimum of 10 years post qualification experience working on projects similar in nature scale and complexity			2
Junior Quantity Surveyor with: - a relevant degree or equivalent professional qualification, and - a minimum of 7 years post qualification experience			3
Total number of suitably qualified resources.			6



NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Civil & Structural)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Principal Civil & Structural Engineer with - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience on projects similar in nature, scale and complexity			1
Senior Civil & Structural Engineer with: - a relevant degree or equivalent professional qualification, and - a minimum of 10 years post qualification experience working on projects similar in nature scale and complexity			2
Civil & Structural Engineer with: - a relevant degree or equivalent professional qualification, and - a minimum of 7 years post qualification experience			2
Assistant Civil & Structural Engineer with: - a relevant degree or equivalent professional qualification, and			1



- a minimum of 5 years post qualification experience			
Total number of suitably qualified resources.			6

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Mechanical, Electrical & ICT)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Principal Mechanical, Electrical & ICT Engineer with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience on projects similar in nature, scale and complexity			1
Senior Mechanical, Electrical & ICT Engineer each with: - a relevant degree or equivalent professional qualification, and - a minimum of 10 years post qualification experience working on projects similar in nature scale and complexity			2
Mechanical, Electrical & ICT Engineer with: - a relevant degree or equivalent professional qualification, and - a minimum of 7 years post qualification experience			2
Assistant Mechanical, Electrical & ICT Engineer with: - a relevant degree or equivalent professional qualification, and			1



- a minimum of 5 years post qualification experience			
Total number of suitably qualified resources.			6

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Planning & Environment)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Senior Planning Consultant with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Senior Environmental and/or Sustainability Consultant with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Total number of suitably qualified resources.			2

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Landscape Architect)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Senior Landscape Architect with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Associate Landscape Architect with: - a relevant degree or equivalent professional qualification, and - a minimum of 7 years post qualification experience			1
Total number of suitably qualified resources.			2

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (PSDP)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Senior Project Supervisor Design Process (PSDP) with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Total number of suitably qualified resources.			1

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Traffic Management)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Senior Traffic Management Consultant with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Total number of suitably qualified resources.			1

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A6 MANPOWER AND SKILLS (Archaeology)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: Applicants must demonstrate access to at least the minimum numbers of skilled personnel stated below. Please note that the skills outlined may reside in the same person.

Skillset	Number of Full Time Equivalents (FTEs)	Number of FTEs provided by 3 rd Parties	Minimum Number Required
Senior Archaeologist with: - a relevant degree or equivalent professional qualification, and - a minimum of 12 years post qualification experience working on projects similar in nature scale and complexity			1
Total number of suitably qualified resources.			1

NOTE: The purpose of this section is to identify whether the Applicant firm has at its disposal the appropriate number and range of skills. Applicants are reminded that they may rely on the resources of other entities on condition that they are fully described, and that Applicants can prove that they will have these resources at their disposal when required.



A7 Previous experience – Declaration (to be completed by all members of the Design Team/Applicants)

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: All members of the Applicants Design Team must confirm that they have successfully delivered services of a comparable nature and scale to those required by the LDA for the tenderers preferred lot for three (3) projects within the previous 5 years.

Contract Name	Contact Person	Outline of Services Provided & Current status of Project



A8 CONFLICT OF INTEREST DECLARATION

Weighting: Pass/Fail only

Minimum requirement to remain eligible in the competition: The Applicant and each member of the Applicant Team must sign and date this Declaration.

Note

I/We can confirm that there is no level of conflict, or perceived conflict of interest, in relation to the personnel or work involved in the Contract:	Yes	
	No	
If No: please explain what the possible conflict or perceived conflict of interest may be and who it relates to and how it could affect the Contract		
Organisation Name		
Role in this Procurement Process		
Contact Name		
Position		



A9 DECLARATION OF BONA FIDES

In relation to an award procedure under Public Sector Directive 2014/24/EU (Article 57).

Weighting: Pass/Fail only

Pass requirement: Applicants must complete, sign and date this Declaration. the Contracting Authority reserves the right at its discretion to exclude a non-compliant Applicant under each heading. This must be completed by each group member.

Economic Operators will be excluded from the procurement process if, within the past five (5) years, there is evidence of a conviction relating to a specific criminal offence listed below (see 1.1) or if they have been the subject of a binding legal decision which found a breach of legal obligations to pay tax or social security contributions (see 1.2) (except where this is disproportionate e.g. where only minor amounts are involved).

		YES	NO
		Please indicate your answer by marking 'X' in the relevant box	
1.1 Has the Economic Operator or a member of their proposed consortium, (if applicable), Director, or Partner or any other person who has powers of representation, decision or control, been convicted of any of the following offences?			
1.1.a	participation in a criminal organisation, as defined in Article 2 of Council Framework decision 2008/841/JHA;		
1.1.b	corruption, as defined in Article 3 of the Convention on the fight against corruption involving officials of the European Communities or officials of Member States of the European Union and Article 2(1) of Council Framework Decision 2003/568/JHA as well as corruption as defined in Irish Law or the jurisdiction in which the Economic Operator is established;		
1.1.c	fraud within the meaning of Article 1 of the Convention on the protection of the European Communities' financial interests;		
1.1.d	the subject of a conviction for terrorist offences or offences linked to terrorist activities or for inciting or aiding or abetting or attempting to commit an offence;		
1.1.e	the subject of a conviction for money laundering or terrorist financing;		



1.1.f	the subject of a conviction of child labour and other forms of trafficking in human beings;		
Non-payment of taxes or social security obligations 1.2 Has it been established by a judicial or administrative decision having final and binding effect in accordance with Irish law or the legal provisions of the country in which the Economic Operator is established (if outside Ireland), that the Economic Operator is in breach of obligations related to the payment of tax and social security contributions? Note: If the response to 1.2 above is in the affirmative, please provide further information on the decision and the amounts involved			

An Economic Operator who answers 'Yes' in any of the situations set out in paragraphs 2.1.a to 2.1.i will be excluded.

2.1 Please indicate if any of the following situations have applied, within the past three (3) years, or currently apply, to your organisation.		YES	NO
		Please indicate your answer by marking 'X' in the relevant box	
The Economic Operator:			
2.1.a	has, in the performance of any public contract, failed to comply with applicable obligations in the field of environmental, social and labour law applying at the place where the works were carried out or the services provided, as established by EU law, national law, collective agreements or by international, environmental, social and labour law listed in Annex X of Directive 2014/24/EU;		
2.1.b	is bankrupt or the subject of insolvency or winding-up proceedings, its assets are being administered by a liquidator or by the court, or has entered into an arrangement with creditors, suspended its business activities or is in any analogous situation arising from a similar procedure under national laws and regulations;		
2.1.c	is guilty of grave professional misconduct which renders its integrity questionable;		



2.1.d	has entered into agreements with other economic operators aimed at distorting competition;		
2.1.e	has a conflict of interest within the meaning of Article 24 of 2014/24/EU that cannot be effectively remedied by other, less intrusive, measures;		
2.1.f	confirms that it has had prior involvement in the preparation of the procurement procedure which has resulted in a distortion of competition, as referred to in Article 41 of 2014/24/EU, that cannot be remedied by other, less intrusive, measures;		
2.1.g	has shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions.		
2.1.h	<ul style="list-style-type: none"> • is guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria; or 		
	<ul style="list-style-type: none"> • has withheld such information or is not able to submit supporting documents required under Article 59 of Directive 2014/24/EU; or 		
2.1.i	<p>has undertaken to:</p> <ul style="list-style-type: none"> • unduly influence the decision-making process of the contracting entity, or • obtain confidential information that may confer upon the Tenderer undue advantages in the procurement procedure; or • negligently provide misleading information that may have a material influence on decisions concerning exclusion, selection or award. 		



DECLARATION RE STATUTORY OBLIGATIONS			
We confirm that we are fully compliant with the following legislation, or equivalent legislation in our country of establishment / operation:		YES	NO
(i)	Employment Equality Acts 1998-2011		
(ii)	Equal Status Acts 2000-2011		
(iii)	National Minimum Wage Act 2000 as amended		
(iv)	Organisation of Working Time Act 1997 as amended		
(v)	Safety, Health and Welfare at Work Act 2005 and Safety, Health and Welfare at Work (General Application) Regulations 2007		
(vi)	Disability Act 2005		
(vii)	We have procedures in place to ensure that our subcontractors, if any are used for this contract, apply the same standards.		
This Declaration is made for the benefit of the Contracting Authority			
I certify that the information provided in this declaration is accurate and complete to the best of my knowledge and belief. I understand that the provision of inaccurate or misleading information in this Declaration will lead to my organisation being excluded from participation in this and future tenders and I am signing on behalf of:			
Name of Economic Operator			
Authorised Signatory			
Name in print or block capitals			
Rank / Position			
Role in Procurement Process			
NOTE:			
The term Economic Operator covers equally the concepts of Contractor, Supplier and Service Provider whether as Applicant, Tenderer or Participant under an award procedure in accordance with the relevant Public Procurement Directive.			



SECTION B - WEIGHTED CRITERIA LOT 1

B1 PREVIOUS CONTRACTS – Architect only.

Applicants may refer to up to five (5) instances within the last **five years** which demonstrate that they have successfully delivered services of a comparable nature and scale to those required by the LDA, for the preferred lot which the tenderer wishes to be considered.

Please provide one example of both new build and retrofit experience in the residential sector and experience acting as Design Team Lead.

The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.

Information shall be submitted using the project sheets below in legible font and shall be limited to 2 pages per project.

The contracts listed should be chosen to demonstrate your firm's skills, efficiency, experience and reliability in the relevant areas of expertise.

All fields should be completed in full. In the event that the information requested on the value of contracts or identity of clients is considered confidential, Applicants must ensure that they provide sufficient information to allow the contracting entity to judge the similarity of these contracts to the services required.

Architectural Services			
CONTRACT #1			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	

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Architectural Services CONTRACT #2			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this framework			



Architectural Services CONTRACT #3			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this framework			



Architectural Services CONTRACT #4			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this framework			



Architectural Services CONTRACT #5			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this framework			



B2 PREVIOUS CONTRACTS – Quantity Surveyor Services only.

Applicants (should refer to three (3) instances within the last **five years** which demonstrate that they have successfully delivered services of a comparable nature and scale to those required by the LDA.

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Please provide one example of both new build and retrofit experience in the residential sector.

The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.

Information shall be submitted using the project sheets below in legible font and shall be limited to 2 pages per project.

The contracts listed should be chosen to demonstrate your firm's skills, efficiency, experience and reliability in the relevant areas of expertise.

All fields should be completed in full. In the event that the information requested on the value of contracts or identity of clients is considered confidential, Applicants must ensure that they provide sufficient information to allow the contracting entity to judge the similarity of these contracts to the services required.

Quantity Surveying Services CONTRACT #1			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			



Quantity Surveying Services CONTRACT #2			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this contract			



Quantity Surveying Services CONTRACT #3			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this contract			



B3 PREVIOUS CONTRACTS – Civil and Structural Engineering Services Only.

Applicants (should refer to three (3) instances within the last **five years** which demonstrate that they have successfully delivered services of a comparable nature and scale to those required by the LDA.

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Please provide one example of both new build and retrofit experience in the residential sector.

The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.

Information shall be submitted using the project sheets below in legible font and shall be limited to 2 pages per project.

The contracts listed should be chosen to demonstrate your firm's skills, efficiency, experience and reliability in the relevant areas of expertise.

All fields should be completed in full. In the event that the information requested on the value of contracts or identity of clients is considered confidential, Applicants must ensure that they provide sufficient information to allow the contracting entity to judge the similarity of these contracts to the services required.

Civil & Structural Engineering Services CONTRACT #1			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			



Civil & Structural Engineering Services CONTRACT #2				
Start Date - End Date				
Client Name & address				
Client contact person:	<table border="1"><tr><td></td><td>Phone no.:</td><td></td></tr></table>		Phone no.:	
	Phone no.:			
Details of Services provided				
Frequency of supply/service				
Approx. Project Capital Value €				
Approx. Annual Appointment Value €				
Please indicate below the extent of which this project is comparable with this contract				



Civil & Structural Engineering Services CONTRACT #3				
Start Date - End Date				
Client Name & address				
Client contact person:	<table border="1"><tr><td></td><td>Phone no.:</td><td></td></tr></table>		Phone no.:	
	Phone no.:			
Details of Services provided				
Frequency of supply/service				
Approx. Project Capital Value €				
Approx. Annual Appointment Value €				
Please indicate below the extent of which this project is comparable with this contract				



B4 PREVIOUS CONTRACTS – Mechanical, Electrical & ICT Engineer only.

Applicants (should refer to three (3) instances within the last **five years** which demonstrate that they have successfully delivered services of a comparable nature and scale to those required by the LDA.

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Please provide one example of both new build and retrofit experience in the residential sector.

The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.

Information shall be submitted using the project sheets below in legible font and shall be limited to 2 pages per project.

The contracts listed should be chosen to demonstrate your firm's skills, efficiency, experience and reliability in the relevant areas of expertise.

All fields should be completed in full. In the event that the information requested on the value of contracts or identity of clients is considered confidential, Applicants must ensure that they provide sufficient information to allow the contracting entity to judge the similarity of these contracts to the services required.

Mechanical, Electrical & ICT Engineering Services CONTRACT #1			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	



Details of Services provided	
Frequency of supply/service	
Approx. Project Capital Value €	
Approx. Annual Appointment Value €	
Please indicate below the extent of which this project is comparable with this contract	



Mechanical & Electrical Engineering Services CONTRACT #2				
Start Date - End Date				
Client Name & address				
Client contact person:	<table border="1"><tr><td></td><td>Phone no.:</td><td></td></tr></table>		Phone no.:	
	Phone no.:			
Details of Services provided				
Frequency of supply/service				
Approx. Project Capital Value €				
Approx. Annual Appointment Value €				
Please indicate below the extent of which this project is comparable with this contract				



Mechanical, Electrical & ICT Engineering Services CONTRACT #3			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this contract			



B5 PREVIOUS CONTRACTS – Planning & Environmental Consultant only.

Applicants (should refer to three (3) instances within the last **five years** which demonstrate that they have successfully delivered services of a comparable nature and scale to those required by the LDA.

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Please provide one example of new build and retrofit experience in the residential sector and experience liaising with local and national stakeholders as part of the planning process.

The contracts referenced for consideration should provide comprehensive information to enable the Contracting Authority to determine their comparability to the requirements of this contract.

Information shall be submitted using the project sheets below in legible font and shall be limited to 2 pages per project.

The contracts listed should be chosen to demonstrate your firm's skills, efficiency, experience and reliability in the relevant areas of expertise.

All fields should be completed in full. In the event that the information requested on the value of contracts or identity of clients is considered confidential, Applicants must ensure that they provide sufficient information to allow the contracting entity to judge the similarity of these contracts to the services required.

Planning & Environmental Services CONTRACT #1			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	



Details of Services provided	
Frequency of supply/service	
Approx. Project Capital Value €	
Approx. Annual Appointment Value €	
Please indicate below the extent of which this project is comparable with this contract	



Planning & Environmental Services CONTRACT #2			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this contract			



Planning & Environmental Services CONTRACT #3			
Start Date - End Date			
Client Name & address			
Client contact person:		Phone no.:	
Details of Services provided			
Frequency of supply/service			
Approx. Project Capital Value €			
Approx. Annual Appointment Value €			
Please indicate below the extent of which this project is comparable with this contract			

INVITATION TO TENDER

Establishment of a multi-party framework agreement for	Architect Led Design Team Services
Procedure	Restricted
eTenders RFT ID	196458
OJEU REF	
Issue Date	11th August 2021
Closing Date for Queries	2nd September 2021 at 12:00hrs
Contact for Queries	Questions and Answers facility on www.etenders.gov.ie
Closing Date / Time for receipt of Completed Tenders	9th September 2021 at 17:00hrs
<p><i>Please note that information relating to this Invitation to Tender, including clarifications and changes, will be published on the Irish Government Procurement Opportunities Portal (www.etenders.gov.ie). Responses to queries will be circulated to all Tenderers by email. The identity of the person making a query will not be disclosed when circulating the response. Please note that the Contracting Authority cannot accept responsibility for information relayed (or not relayed) via third parties.</i></p>	

TABLE OF CONTENTS

1. Disclaimer	4
2. Summary	4
3. About the Contracting Authority	5
3.1 The Projects	5
4. Scope of the Framework Agreement.....	6
4.1 Numbers Admitted to the Framework Agreement	7
4.2 Duration of the Framework Agreement	7
4.3 Estimated Value of the Framework Agreement.....	7
4.4 Awarding Contracts under the Framework Agreement.....	7
4.5 Review of Performance.....	8
4.6 Account Management	8
4.7 Details of Contracts Arising Over Life of Framework Agreement.....	9
4.8 Right to Tender outside of the Framework	10
4.9 Award to Runner Up for the conclusion of the Framework	10
4.10 Replacement Personnel:.....	10
4.11 Award of Project Management Contracts and Design Team Contracts to same Economic Operator.....	10
5. Specification of Requirements for Initial Contract under the Framework.....	11
5.1 The Team	11
5.2 Detailed Specification of Requirements.....	11
5.3 The Project – Cromcastle, Dublin.....	11
5 Award Criteria	12
APPENDIX 1 - INSTRUCTIONS TO TENDERERS	16
(a) Submission of Tenders.....	16
(b) Queries	16
(c) Sufficiency & Accuracy of Tender.....	17
(d) Tender Documents - Ambiguity, Discrepancy, Error, Omission	17
(e) Qualification of Tenders and Referential Bids.....	17
(f) Extension of Tender Period.....	17
(g) Modifications to Tenders prior to the Closing Date for Receipt of Tenders.....	17
(h) Form of Tender.....	17
(i) Cost of Preparation of Tender.....	17
(j) Clarification of Tenders	18
(k) Correction of Errors	18
(l) Tender Validity Period.....	18
(m) Currency and Payments	18
(n) Confidentiality.....	18

(o) Conflict of Interest	18
(p) Freedom of Information Acts	19
(q) Tax Clearance	19
(r) Withholding Tax.....	19
(s) Irish Legislation and Law	20
(t) Dignity at Work	20
(u) Interference and Inducement to Purchase	20
(v) Notification of Tender Evaluations	20
(w) Award Notices	20
(x) Policy on Personal Debriefings.....	21
(y) Replacement Personnel	21
(z) Copyright.....	21
(aa) Brand Names, etc.....	21
(bb) Payment.....	21
(cc) Right Not to Award	21
(dd) Environmental Aspects.....	21
(ee) Accessibility.....	22
(ff) Knowledge and Skills Transfer	22
(gg) Collusive Tendering.....	22
(hh) Change in the Composition of a Tender	22
(ii) Consortia and Prime Subcontractors	22
(jj) Anti-Competitive Conduct	23
(kk) Data Protection.....	23
(ll) Publicity.....	23
APPENDIX 2 – FORM OF TENDER	24
APPENDIX 3 – RESOURCE ALLOCATION SCHEDULE	25
APPENDIX 4 – FRAMEWORK AGREEMENT TERMS AND CONDITIONS	26
APPENDIX 5 – THE CONTRACTING AUTHORITY TERMS AND CONDITIONS.....	27
APPENDIX 6 – DATA PROTECTION AGREEMENT	28
APPENDIX 7 – OUTLINE BRIEF, CROMCASTLE.....	29
APPENDIX 8 – FRAMEWORK SCOPE OF SERVICES	30
APPENDIX 9 – PRICING AND RESOURCE BREAKDOWN.....	31
APPENDIX 10 – SCHEDULE OF INSURANCES & SERVICE INSURANCE QUESTIONNAIRE	32
APPENDIX 11 – KEY PERFORMANCE INDICATORS.....	33

1. Disclaimer

This document issued herewith (“the Document”) is for information only and does not constitute, and shall not be interpreted as, an offer for sale, prospectus, or the basis of a contract.

Tenderers are recommended to read the documents thoroughly. While all reasonable steps have been taken to ensure that the information set out in the Document is accurate and up to date, no representation or warranty, express or implied, is or will be made or given in relation to the accuracy or the completeness of any information contained in the Document or otherwise provided by or on behalf of the Contracting Authority (in writing or otherwise) to any interested party or its advisers. No responsibility or liability for any loss or damage arising as a result of reliance on these documents, or for the information contained in these documents or for any omission is or will be accepted by the Contracting Authority or by any of its officers, employees, agents or professional advisers. No officer, employee, agent, or professional adviser of the company has any authority to give or make any representation or warranty, express or implied, in relation to such information. The Contracting Authority’s officers, employees, agents and professional advisers expressly disclaim any and all liability arising out of such documentation or information and any errors or omissions in or from the documents and information.

The Contracting Authority reserves the right to discontinue the procurement process at any time.

2. Summary

Contracting Authority	Land Development Agency
Nature of Procurement	<i>Architect Led Design Team</i>
Type	Services
Procedure	The Contracting Authority is utilising the EU Restricted procedure of European Council Directive 2014/24/EU
Stage in procedure	This is the second stage of this competitive procedure whereby parties who have been deemed qualified on foot of their Expression of Interest may submit a Tender.
Award Criteria	As contained in Section 5 of this Document.

3. About the Contracting Authority

The Land Development Agency (LDA), established in September 2018, is a key Government land management initiative.

Its objectives are to:

- Coordinate appropriate State lands for regeneration and development, opening key sites for housing delivery.
- Driving strategic land assembly, working with both public and private sector land owners.
- Contributing towards the delivery of affordable housing; and
- Become a leading influencer of housing and land management, through research and innovation.

The LDA is underpinned by grounding legislation and is overseen by an independent board of directors. The Government has committed to providing the LDA with equity capital of up to €1.25 billion.

3.1 The Projects

The LDA are exploring a number of projects at the following sites:

Pipeline Site	Projected Units
Dyke Road	250
Kilbarry, Cork	3,000
Bricins / Arbour Hill	400
Site 1, Cork Docks	600
Site 2, Cork Docks	400
East Wall, Dublin Port	200
Sandy Road	500
Cherry Orchard	1,000
Dublin 8	750
Leinster Region, location undisclosed.	1,500
Leinster Region, location undisclosed.	800
Munster Region, location undisclosed.	200
Leinster Region, location undisclosed.	180
Leinster Region, location undisclosed.	500
Leinster Region, location undisclosed.	2,500
Total	12,780

It should be noted that this list is not exhaustive, and the LDA reserve the right to add or remove projects from this list throughout the duration of the Framework Agreement.

4. Scope of the Framework Agreement

The Contracting Authority proposes to engage in a competitive process for the establishment of a *multi-party* framework agreement for Architect Led Design Team Services.

A framework agreement constitutes a means of establishing overall terms and conditions in accordance with which, for a specified duration, individual contracts may or not be awarded. In the case of a multi-party framework agreement, contracts will be awarded in accordance with the process outlined herein.

It is emphasised that a framework agreement constitutes no guarantee to purchase a specific quantity of supplies or services from a particular economic operator. Indeed, the Contracting Authority reserves the right to operate outside of the framework agreement at its discretion, particularly should it become apparent that doing so would offer greater value for money. Notwithstanding the foregoing, the framework agreement approach has been adopted in order to leverage efficiencies and maximise cost savings over the duration of the framework

The framework will be delivered in two lots:

- Lot 1 – Architect-led design team framework for a development of projects exceeding 300 units of accommodation (or development equivalent).
- Lot 2 – Architect-led design team framework for a development of projects 300 units of accommodation and less (or development equivalent).

The Architect Led Design Team will comprise

- a) Architectural Services (incl. Design Team Leader, conservation, masterplan & urban design, fire safety design services, disability access design services, employer's representative for the Works Contract and design certifier as defined under the Building Control (Amendment) Regulations 2014).
- b) Civil & Structural Engineering Services
- c) Quantity Surveying Services
- d) Mechanical, Electrical & ICT Engineering Services
- e) Landscape Architectural Services
- f) Project Supervisor for the Design and Construction Process
- g) Planning & Environmental Consultant
- h) Traffic Management Services
- i) Archaeological Services
- j) Assigned Certifier Services (does not form part of the Cromcastle scope of service)
- k) Other ancillary design and consultancy services as required

The architectural services consultant will be the design team lead and will act as the single point of contractual responsibility, with the remaining key disciplines providing collateral warranties for the benefit of the Contracting Authority.

4.1 Numbers Admitted to the Framework Agreement

The framework agreement will be established as a multi-party framework agreement with five (5) tenderers selected per lot following the tender stage and the application of the award criteria. Thereafter they will be considered for the award of all contracts within the scope of the framework agreement.

4.2 Duration of the Framework Agreement

The maximum duration of the framework agreement will be three [3] years subject to satisfactory annual review of performance. This may be extended for one [1] additional year.

For the avoidance of doubt, the Contracting Authority confirms that the period of any contracts awarded under the framework agreement may extend beyond the date of expiry of the agreement.

4.3 Estimated Value of the Framework Agreement

The estimated total value of purchases pursuant to the framework agreement for:

- Lot 1 is in the region of €50m (ex. VAT) over the lifetime of the agreement.
- Lot 2 is in the region of €25m (ex VAT) over the lifetime of the agreement.

It is emphasised, however, that this figure is provided strictly for indicative purposes only as there is no guaranteed expenditure under the framework agreement.

4.4 Awarding Contracts under the Framework Agreement

Individual contracts may be awarded as follows:

(a) A mini-tender competition will be conducted with all firms admitted to the framework agreement for the relevant lot, depending on project size. On each occasion a Request for Tender will be issued detailing the scope of requirements, the award criteria and a closing date and time. As previously noted, firms can only be admitted to one lot of the framework and will only be invited to tender for projects within that lot.

(b) In circumstances where a mini tender competition is run between the members of the Framework as described above, and a competition is not successfully concluded, for example, where no tenders are received, or the tenders received are not capable of acceptance for any reason, the Contracting Authority reserves the right to consult any member of the Framework regarding proposals for performing the required Services and to directly award the required Services to such member where this is the most expedient way to proceed, taking into account any relevant considerations.

(c) In circumstances where any Services required by the Contracting Authority under this Agreement comprise (a) the repetition of similar Services (i.e. that is services relating to the same project) previously performed for the Contracting Authority by a member of the Framework, or (b) an amendment or termination of arrangements in respect of which a member of the Framework previously advised

or provided Services, the Contracting Authority reserves the right to directly award the required Services to such member where this is the most expedient way to proceed, taking into account any relevant considerations such as the need to ensure continuity of the services and affordability.

(d) The Contracting Authority reserves the right to directly award Services to any member of the Framework, within the relevant lot, if it considers it necessary to do so in respect of particular matters, having regard to timing, availability and expertise of resources, conflicts of interest and such other criteria as it considers relevant to such matters.

(e) The Contracting Authority may, from time to time, obtain specific specialist services, up to a value of €25,000, that are covered by this Framework directly from one of the firms admitted to the framework agreement in accordance with Recital 61 of Directive 2014/24/EU.

(f) Within each separate Lot there will also be an allowance for a cascading (rotational) framework for work up to a value of €50,000. This work may include but is not limited to due diligence, feasibility studies, site assessment, block planning for site evaluation purposes etc. This will be a five party rotational arrangement with all framework members with the first appointment to go to the top ranked member, second appointment to the second placed and so on to the fifth ranked. Candidates on the panel who are consistently unable to undertake the works or fail on the pre-set KPI targets may be removed from the panel.

(g) The Contracting Authority reserves the right to amalgamate sites to form a single project for mini-tender competition where efficiencies can be gained and this is deemed advantageous to the LDA, for example, due to scope, programme, location etc.

4.5 Review of Performance

To ensure services are provided to a continuously high standard by the framework members, bi-annual performance reviews will be carried out with each framework member. The main criteria for measuring performance will be as listed below and as detailed in the Framework Agreement. It is expected that the successful tenderer(s) will take a proactive role in monitoring performance with a view to making appropriate recommendations where necessary for continuous improvement.

- Understanding of Client brief
- Design process and quality
- Communication and responsiveness
- Agreed programme delivery
- Budget and risk management
- Fee competitiveness and completeness
- Innovation & Sustainability

4.6 Account Management

The Contracting Authority requires tenderers to nominate a dedicated account manager who will act as the main point of contact for the duration of the contract.

This person shall have the authority to deal with all matters in relation to the contract and be responsible for the satisfactory delivery of the services required. The duties of the account manager will include the following:

- Overall responsibility for a good working relationship with the Contracting Authority;
- Meet as and when required to review the relationship and examine performance;
- Deal with disputes, complaints or concerns that cannot be adequately resolved;
- Regularly give and receive both formal and informal feedback on the relationship, workloads, processes, areas and suggestions for improvement and cost savings;
- Proactively discuss with the Contracting Authority ways of improving efficiency regarding service delivery in general.

NOTE: Tenderers will note that account management activities will be non-billable (i.e. the Contracting Authority will not pay separately for account management activities). The Contracting Authority will nominate authorised staff to liaise with the successful Framework Member[s] and delegate as required.

4.7 Details of Contracts Arising Over Life of Framework Agreement

In addition to the initial contract, the framework agreement may also be used for the other projects under LDA's remit and any other projects that may be assigned to LDA over the duration of the Framework.

The anticipated projects include;

Pipeline Site	Projected Units
Dyke Road	250
Kilbarry, Cork	3,000
Bricins / Arbour Hill	400
Site 1, Cork Docks	600
Site 2, Cork Docks	400
East Wall, Dublin Port	200
Sandy Road	500
Cherry Orchard	1,000
Dublin 8	750
Leinster Region, location undisclosed.	1,500
Leinster Region, location undisclosed.	800
Munster Region, location undisclosed.	200
Leinster Region, location undisclosed.	180
Leinster Region, location undisclosed.	500
Leinster Region, location undisclosed.	2,500
Total	12,780

It should be noted that there is no guarantee that the projects as listed above will proceed, and the LDA reserve the right to add or amend the list as appropriate depending the projects assigned to it.

4.8 Right to Tender outside of the Framework

The Contracting Authority intends to use the framework for the procurement of requirements falling within its scope during the specified period; however, it reserves the right to tender outside the framework for the procurement of any requirement without reference to the framework member. Admission to a framework does not guarantee the award of any contract to any economic operator, nor does it give the member the right to be consulted in respect of, or tender for, any contract.

Admission to the framework will be conditional upon acceptance of the Contracting Authority's framework agreement (Appendix 4) and the Contracting Authority's Terms and Conditions for all Contracts (Appendix 5).

4.9 Award to Runner Up for the conclusion of the Framework

If for any reason, it is not possible to establish the framework agreement or award the initial contract to the designated successful tenderer emerging from this competitive process; the Contracting Authority reserves the right to establish the framework with the next highest scoring tenderer based on the terms advertised at any time during the tender validity period. This shall be without prejudice to the right of the Contracting Authority to cancel this competitive process and/or initiate a new contract award procedure at its sole discretion.

Likewise, if having awarded a contract under the framework, the Framework Member cannot, for whatever reason, deliver the required services to the satisfaction of the Contracting Authority; the Contracting Authority reserves the right to terminate the contract and their membership of the framework and to award the contract and framework membership by mutual agreement to the next highest-ranked tenderer on foot of the original procedure based on the terms advertised, at any time during the framework agreement tender validity period. This shall be without prejudice to the right of the Contracting Authority to cancel this competitive process and/or initiate a new contract award procedure at its sole discretion.

4.10 Replacement Personnel:

Notification must be sent in writing as soon as possible to the Contracting Authority on any proposed change of nominated personnel, such change to be subject to the written approval of the Contracting Authority. Replacement personnel must be of equal or better standing than the personnel originally nominated in terms of qualifications and experience.

4.11 Award of Project Management Contracts and Design Team Contracts to same Economic Operator

It is anticipated that the Contracting Authority will separately procure Project Management Services, Assigned Certifier and Property Advisory Services to act on their behalf.

For avoidance of doubt, companies may be appointed to both Frameworks, but where a successful tenderer is appointed as Design Team to a specific project, no member of their team will be permitted to be appointed as Project Manager to that project.

5. Specification of Requirements for Initial Contract under the Framework

The Framework agreement will be established on foot of a competition for an initial contract for Cromcastle.

The Initial Contract will be awarded to the top scoring tenderer shortly after the formal establishment of the framework agreement.

5.1 The Team

The Architect Led Design Team will comprise

- a) Architectural Services (incl. design team lead, fire safety design services, disability access design services, Employer's Representative for the Works Contract design certifier and assigned certifier services as defined under the Building Control (Amendment) Regulations 2014. (Assigned Certifier Services does not form part the Cromcastle scope of service)
- b) Civil & Structural Engineering Services,
- c) Mechanical and Electrical Engineering Services
- d) Quantity Surveying Services,
- e) Landscape Architectural Services,
- f) Project Supervisor for the Design and Construction Process,
- g) Planning & Environmental Consultant,
- h) Traffic Management Services,
- i) Other ancillary design and consultancy services as required

The architectural services consultant will be the design team lead and will act as the single point of contractual responsibility, with the remaining key disciplines providing collateral warranties for the benefit of the Contracting Authority

5.2 Detailed Specification of Requirements

The Design Team will provide a comprehensive range of services, including but not limited to: feasibility studies, master-planning services, new build residential projects delivered through traditional contracts, new build residential projects delivered via design & build contracts, area regeneration projects, residential retrofit/refurbishment projects, conservation projects & works to protected structures, small works, public realm and precinct improvements, public buildings etc.

5.3 The Project – Cromcastle, Dublin

See Appendix 7 Outline Brief Cromcastle.

5 Award Criteria

Tenderers should ensure that they have submitted sufficient relevant information to allow their tenders to be assessed under each of the award criteria set out below.

The **framework/contract** will be awarded on the basis of the economically most advantageous compliant tender taking into account the following award criteria and weightings.

Please ensure to restrict submissions to the page limits specified as information submitted which exceeds the limits specified for each section will not be reviewed.

	Criteria	Weighting	Maximum Score	Minimum Score Required
A	Ultimate Cost to the Contracting Authority over the life of the contract	30%	3000	n/a
<p><i>Tenderers are required to outline their cost proposal by completing and signing the attached Form of Tender (Appendix 2) and providing a breakdown of their costs (Appendix 9 Pricing & Resource Breakdown excel sheet)</i></p> <p><i>The Ultimate Cost will be determined as follows</i></p> <ol style="list-style-type: none"> <i>Tenderers to apply hourly rates to the notional hours outlined in Appendix 9, leading to a notional figure for time charges;</i> <i>The lump sum fee for services (properly tendered) will be added to the above</i> <i>The total figure obtained from a) + b) will be the overall notional ultimate cost for the purpose of assessment.</i> 				
B	Resourcing of the Project / Technical Merit of the Team	30%	3000	1500
<p><i>Tenderers are required to submit details of the personnel proposed for the delivery of each stage of the contract (i.e. 1a. feasibility, 1b. preliminary design and planning, 2. detailed design, 3. tender action, evaluation and award, 4. construction, and 5. handover), together with their proposed overall project time allocations.</i></p> <p><i>Tenderers shall include the following:</i></p> <ul style="list-style-type: none"> <i>Project Team Organisation Chart identifying consultants / sub-consultants making up the team and the key personnel.</i> <i>CVs of the Key Team Members proposed for delivery of each stage of the contract, including the nominated Account Manager (as set out in Section 4.6), to include information with dates regarding expertise and experience. Note for projects referenced in CV's, indicate what stage of the project the person was involved in and their role/responsibilities. Maximum of 2 x A4 page per person.</i> <i>A narrative for the following disciplines (only):</i> <ul style="list-style-type: none"> <i>Masterplanning and Architectural Design (excluding Design Certifier, Assigned Certifier, DAC, Fire, PSDP services),</i> <i>Civil & Structural Engineering,</i> <i>Mechanical and Electrical Engineering</i> 				

- Quantity Surveying
- Planning Consultant
- Sustainability Specialist

Identifying the key personnel proposed for delivery of the project, including their responsibilities, relevant previous experience and the benefits that each of the personnel will bring to ensuring the successful delivery of the project. **Maximum of 5 x A4 pages.**

Resourcing proposals will be assessed in respect of the quality and balance of resourcing offered.

Information included in the breakdown of Tender Sum in the Pricing & Resource Breakdown submitted with the Tender will form part of the assessment of this criterion.

Tenderers are required to complete Appendix 3 indicating the personnel proposed for the Project.

C	Execution Methodology	20%	2000	1000
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Tenderers are required to submit their project-specific proposal for the effective delivery of the Project, management of the design team and liaison with stakeholders. **Maximum of 6 x A4 page.**

- Tenderers must submit their proposed project-specific multidisciplinary approach and methodology for the delivery of each of the services required under the Contract to ensure the delivery of a timely and efficient service, clearly addressing each of the disciplines / roles set out in the service requirements.
- Tenderer must outline how they propose to ensure adherence to programme, budget, design brief and quality parameters as agreed with the Contracting Authority.
- Tenderers must outline (in narrative format as opposed to a Risk Register) their perceived key project-specific risks and proposed mitigation measures.

D	Sustainable Design	10%	1000	500
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Tenderers are required to demonstrate their project-specific approach to sustainable design with reference to the sustainable urban design brief contained in Appendix 7 Outline Brief Cromcastle. Tenderers are asked to submit a **Maximum of 4 x A4 pages** of text, diagrams & illustrations as appropriate in addition to a **Maximum of 2 x A3 Sheets (landscape format)** containing site specific sketches, images and other visual material as appropriate to illustrate the sustainable design concepts which will underpin their design approach.

E	Cost Efficient Design	10%	1000	500
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Tenderers are required to outline their project-specific proposed approach for ensuring cost efficient design and delivery solutions are brought to the fore highlighting the key building design metrics to be targeted. **Maximum of 4 x A4 page.** (In addition, tenderers can, if they so wish, include drawings or sketches as appendices (maximum 2 x A3 page)).

NOTE 1: Tenderers should note that they must achieve a minimum rating of 50% for each of the individual qualitative criteria (B) to (E) in order to avoid elimination from the competition.

Qualitative criteria will be scored using the following baseline scoring system:

Score	Meaning	Interpretation
90 – 100%	Outstanding	An outstanding response demonstrating extensive understanding offering full assurance to client – fully supported with no reservations.
80 – 89%	Excellent	An excellent response demonstrating excellent understanding offering assurance to client – fully supported.
70 – 79%	Very good	A very good response demonstrating very good understanding offering assurance to client – strongly supported.
60 – 69%	Good	A good response demonstrating good understanding offering assurance to client – well supported.
50 – 59%	Acceptable	An acceptable response demonstrating a minimum understanding offering assurance to client - satisfactorily supported.
Less than 50% is unacceptable		

Marks between the base lines outlined above can be awarded where responses so merit additional marks.

NOTE 2: The lowest cost tender that also meets all of the minimum requirements of the qualitative award criteria will receive the maximum score achievable under this criterion. The scores of the other valid tenders will be calculated using the following formula:

Lowest Cost from a Bona Fide Tender	A
Cost for the tender being evaluated	B
Maximum Points available for Cost	3000*
Formula employed	$\frac{3000^* \times A}{B}$

NOTE 3: Tenderers should ensure in their tenders that they provide detailed information in respect of all aspects of the contract award criteria as stated above. This will enable the awarding authority to assess fully the extent of their offers.

- NOTE 4: Award of contract may be subject to attendance at a clarification and verification meeting. It would be essential that the key personnel assigned to this contract should be available and present at this meeting.
- NOTE 5: Tenderers should note that the Contracting Authority reserves the right to confirm that the financial and technical capacity of the tenderer is valid and unchanged prior to the award of any contract.
- NOTE 6: If the Contracting Authority considers the tender submission to be commercially unsustainable or otherwise problematic considering the tendered price or any other financial matter (including proposed indicative hours), the tenderer shall be invited to provide clarification to the Contracting Authority in respect of all elements of the tender submission that the Contracting Authority deems relevant. Any failure to satisfactorily comply with such a request, or to satisfactorily address the Contracting Authority's concerns, may, at the discretion of the Contracting Authority, result in the elimination of the tender in question based on it being considered abnormally low.

APPENDIX 1 - INSTRUCTIONS TO TENDERERS

(a) Submission of Tenders

The Contracting Authority is using the tender Postbox facility and tenders must be submitted electronically via the etenders postbox facility on www.etenders.gov.ie only. Tenderers must ensure that they give sufficient time to upload their tender response. All Tenders submitted in soft copy must be compiled such that they can be read immediately using PDF readers.

The Contracting Authority is not responsible for corruption in electronic documents. Tenderers must ensure electronic documents are not corrupt.

In responding to this tender all tenders must follow the format of the tender document and respond to each element of the tender document in the order as set out in this RFT. Tenders must be completed in English. Tenders should produce their response as a **SINGLE UPLOADED FILE, if possible, which is clearly labelled, page numbered and indexed with the exception of graphics which should be in a separate file.**

Tenderers must ensure that they give themselves sufficient time to upload and submit all required tender documentation before the tender closing date/time. Tenderers should take into account the fact that upload speeds vary. There is a maximum of 2.14 GB for individual files sent to the electronic postbox and a one-hour limit for upload. In order to submit a document to the electronic postbox, please note that you must click "Submit Response". After submitting you can still modify and re-send your response up until response deadline. Tenderers should be aware that the 'Submit Response' button will be disabled automatically upon the expiration of the response deadline.

Tenderers not familiar with uploading on eTenders should ensure they familiarise themselves with the process.

The closing date for tenders is **9th September 2021 at 17:00hrs**

It is the responsibility of the tenderer to ensure that their tender is complete and is uploaded by the designated deadline. **Tenders that are received late or via other means WILL NOT be considered in this public procurement competition**

(b) Queries

All queries regarding this tender should be through the Questions and Answers facility on www.etenders.gov.ie The closing date for receipt of queries is **2nd September 2021 at 12:00hrs**

Responses to queries will be circulated to all Tenderers through www.etenders.gov.ie in order to ensure that no party has an unfair advantage over any other.

For the purpose of circulating responses queries will be edited to avoid disclosing the identity of the querist, and any sensitive information included in the query should be clearly indicated. Please note that the Contracting Authority cannot accept responsibility for information relayed (or not relayed) via third parties.

(c) Sufficiency & Accuracy of Tender

Tenderers will be deemed to have examined all the documents enclosed and by their own independent observations and enquiries will be held to have fully informed themselves as to the nature and extent of the requirements of the tender.

Tenderers are cautioned to check the accuracy of their tender prior to submission. A tender found containing any clerical errors or omissions may, at the sole discretion of the Contracting Authority, be referred back to the tenderer for correction. Any subsequent adjustment(s) must be confirmed in writing.

The Contracting Authority reserves the right to disqualify incomplete tenders.

(d) Tender Documents - Ambiguity, Discrepancy, Error, Omission

If you consider that you are missing any documents which would prevent you from submitting a comprehensive tender please contact us as soon as possible.

Tenderers shall immediately notify the Contracting Authority should they become aware of any ambiguity, discrepancy, error or omission in the Tender Documents. The Contracting Authority will, upon receipt of such notification, issue a clarification via eTenders in respect of any such ambiguity, discrepancy, error or omission. Such clarification shall then form part of the Tender Documents.

(e) Qualification of Tenders and Referential Bids

Please note that qualifications to a Tender may be considered a counter offer and may render the tender invalid. Tenders made by reference to other tenders are not valid and cannot be considered.

(f) Extension of Tender Period

The Contracting Authority reserves the right, at its sole discretion, to extend the closing date for receipt of tenders by giving notice in writing to all parties who have expressed an interest in the notice via eTenders no later than six days before the original closing date.

(g) Modifications to Tenders prior to the Closing Date for Receipt of Tenders

Modifications to Tenders will be accepted in the form of supplementary information and/or addenda, provided they are submitted electronically via the etenders postbox facility on www.etenders.gov.ie only before the closing date for receipt of tenders and clearly marked as part of the tender. Any modifications received, by whatever means, after the closing time for receipt of tenders will not be considered.

(h) Form of Tender

Tenderers are required to complete, sign and return the Form of Tender set out in Appendix 2 to this Invitation to Tender. Failure to sign the Form of Tender, or to complete it in the required format, will result in rejection of the tender.

(i) Cost of Preparation of Tender

The Contracting Authority will not be liable for any costs, charges or expenses incurred by tenderers in the preparation of proposals or any associated efforts. It is the responsibility of the tenderer to ensure that they are fully aware and understand the requirements as laid down in this document. Tenderers will be responsible for

any costs incurred by them in the event that they are required to attend clarification or other meetings or make a presentation of their proposals.

(j) Clarification of Tenders

The Contracting Authority is entitled, but not obliged, to seek clarification of tenders, including pricing breakdowns in the course of the evaluation process. No change in the price or substance of the Tender shall be sought, offered or permitted. To assist in finalising the tender evaluation, selected tenderers may be invited to attend clarification meetings with the Contracting Authority.

(k) Correction of Errors

Detailed pricing of all tenders will be examined for errors that might alter the tender pricing as determined from the figures on the tender form or as between the hard copy and electronic versions of the tender. In general, the following approach will be applied to manifest errors where there is a discrepancy between the unit price and the total amount derived from the multiplication of the unit price and the quantity, the unit price as quoted will normally govern.

The amount stated in the tender form will be adjusted by the Contracting Authority in accordance with the above procedure and, with the agreement of the tenderer, shall be considered as binding upon the tenderer. Without prejudice to the above, a tenderer not accepting the correction of their tender as outlined may have their tender rejected.

(l) Tender Validity Period

To allow sufficient time for Tender assessment a Tender Validity period of 12 months is required, this period commencing on the closing date by which the Tenders are to be returned.

(m) Currency and Payments

The currency and invoices in which all prices and rates shall be tendered, and which payments under the contract will be paid, shall be Euros (€). All prices and rates quoted should be exclusive of VAT.

A schedule of payments will be agreed with the successful tenderer. The Contracting Authority operates in accordance with the European Communities (Late Payment in Commercial Transactions) Regulations 2012. The method of payment used by the Contracting Authority is normally Electronic Funds Transfer.

(n) Confidentiality

The distribution of the tender documents is for the sole purpose of obtaining offers. The distribution does not grant permission or licence to use the documents for any other purpose. Tenderers are required to treat the details of all documents supplied in connection with the tender process as private and confidential.

(o) Conflict of Interest

Any conflict of interest involving a tenderer (or tenderers in the event of a consortium bid) must be fully disclosed to the Contracting Authority. Any registrable interest involving the tenderer and the Contracting Authority or employees of the Contracting Authority or their relatives must be fully disclosed in the tender submission or should be communicated to the Contracting Authority immediately upon such information

becoming known to the tenderer, in the event of this information only coming to their notice after the submission of a bid and prior to the award of the contract. The terms 'registrable interest' and 'relative' shall be interpreted as per Section 2 of the Ethics in Public Office Act, 1995. Failure to disclose a conflict of interest may disqualify a tenderer or invalidate an award of contract, depending on when the conflict of interest comes to light.

(p) Freedom of Information Acts

All responses to this invitation to tender will be treated in confidence and no information contained therein will be communicated to any third party without the written permission of the tenderer except insofar as is specifically required for the consideration and evaluation of the response or as may be required under law, including the Freedom of Information Act 2014, EU and Irish Government Procurement Procedures, or in response to questions, debates or other parliamentary procedures in or of the Oireachtas (the Irish Parliament).

Tenderers are asked to consider if any of the information supplied by them in response to this request for tenders should not be disclosed because of its sensitivity. If this is the case, tenderers should specify the information that is sensitive and the reasons for its sensitivity. The Contracting Authority cannot guarantee that any information provided by tenderers, either in response to this tender or in the course of any contract awarded as a result thereof, will not be released pursuant to the Contracting Authority's obligations under law, including the Freedom of Information Act 2014, EU and Irish Government Procurement Procedures. The Contracting Authority accepts no liability whatsoever in respect of any information provided which is subsequently released or in respect of any consequential damage suffered as a result of such disclosure.

(q) Tax Clearance

It will be a condition of award of this framework and any subsequent contract that the successful tenderer(s) comply with all EU and national tax laws. Tenderers are referred to the Irish Revenue web site <http://www.revenue.ie/>. Non-resident tenderers should apply to the Office of the Revenue Commissioners, Non-Resident Tax Clearance Unit, Office of the Collector General, Sarsfield House, Francis Street, Limerick, Ireland; e-mail: nonrestaxclearance@revenue.ie. The Contracting Authority will satisfy themselves that any tenderers being considered for award of a framework / contract are appropriately tax compliant by checking their status via the online system for which tenderers are requested to provide their Tax Clearance Access Number and Tax Reference Number to facilitate verification. By supplying these numbers tenderers acknowledge and agree that the Contracting Authority has the permission to verify its tax cleared position at any time during the term of the framework agreement / contract.

(r) Withholding Tax

Where applicable, payments shall be subject to Irish 'Professional Services Withholding Tax' at the prevailing rate (currently at 20%) as laid down by the Revenue Commissioners in Ireland. Non-residents may be able to reclaim such deducted Tax from the Office of the Revenue Commissioners in Ireland, International

Claims Section located currently at Government Buildings, Nenagh, Co. Tipperary, Ireland (Tel: 353-1-6733533).

(s) Irish Legislation and Law

Tenderers should be aware that national legislation applies in other matters such as Employment, Working Hours, Official Secrets, Data Protection and Health and Safety. Tenderers must have regard to statutory terms relating to minimum pay and to legally binding industrial or sectoral agreements in the Contracting Authority tenders and in delivering contracts awarded to them.

The contract[s] awarded on foot of this tender process will be governed by Irish law.

(t) Dignity at Work

The successful tenderer(s) shall comply with all relevant legislation relating to dignity at work. As a public body and employer, the Contracting Authority is committed to a policy of equality of opportunity for all personnel.

(u) Interference and Inducement to Purchase

Any effort by the tenderer to unduly influence the Contracting Authority, relevant agency personnel or any other relevant persons or bodies in the process of examination, clarification, evaluation and comparison of tenders and in decisions concerning the Award of Contract shall have their tender rejected. In accordance with Section 38 of the Ethics in Public Office Act 1995 any money, gift or other consideration from a person holding or seeking to obtain a contract will be deemed to have been paid or given corruptly unless the contrary is proved.

(v) Notification of Tender Evaluations

All tenderers will be informed of the outcome of their proposals following tender evaluation and any necessary clarifications. Potential outcomes can be:

- When establishing frameworks with or without an initial contract
 - a) Appointment to Framework and Letter of Intent (initial contract)
 - b) Letter of Regret

In the case of EU value contracts, the following information will be provided in the Letter of Regret – name of successful tenderer designate; the applicable standstill period; scores of tenderer and that of successful tender; features and characteristics of the winning tender. The Contracting Authority will undertake not to award the contract for a period of at least 14 (or whatever period is stated in the notification letters) days from the date of notification of unsuccessful tenderers ('standstill period').

(w) Award Notices

Following the award of contract, award notices will be published on a quarterly basis in www.etenders.gov.ie for all national contracts exceeding €25k in value. This notice will state the name(s) of the successful tenderers.

Following the award of contract, an award notice will be despatched to the Official Journal of the European Union announcing the results of the competition no later than 30 days after the award of contract. It should be noted that it is standard practice for the Contracting Authority to include the price of the winning tender or the

range of prices of tenders received in the publication of the award notice as required under European procurement rules.

(x) Policy on Personal Debriefings

Based on the provision of the information to unsuccessful tenderers as outlined above and due to resourcing constraints, the Contracting Authority will not be offering individual debriefing meetings to unsuccessful bidders.

(y) Replacement Personnel

Notification must be sent in writing as soon as possible to the Contracting Authority on any proposed change of nominated personnel, such change to be subject to the written approval of the Contracting Authority. Replacement personnel must be of equal or better standing than the existing personnel in terms of qualifications and experience.

(z) Copyright

The Contracting Authority will have copyright ownership of any material developed for use by the Contracting Authority under the terms of this tender. The service provider may have a non-exclusive licence to use such material but only for its own purposes (to be agreed with the successful tenderer)

(aa) Brand Names, etc.

Please note in relation to this tender document; where reference is made to a particular make, source, process, trademark, type or patent, that this is not to be regarded as a de facto requirement. In all such cases it should be understood that the reference in question is accompanied by the words "or equivalent".

(bb) Payment

A schedule of payments will be agreed with the successful tenderer. The Contracting Authority operates in accordance with S.I. 580 of 2012 which transposes EU Directive 2011/7/EU on combating Late Payment in commercial Transactions. The method of payment used by the Contracting Authority is normally Electronic Funds Transfer. Payments for services provided to the Contracting Authority will only be issued once Contract Terms and Conditions have been executed.

(cc) Right Not to Award

The Contracting Authority does not bind itself to accept the most economically advantageous tender or any tender. It also reserves the right to accept or reject in whole or in part any or all tenders received, and, in particular, to source the requirement with more than one service provider.

The invitation to tender is issued in good faith; however, the Contracting Authority at its sole discretion shall not be obliged to award a contract or proceed to further stages in the procurement process and reserves the right to cancel the procurement at any time.

(dd) Environmental Aspects

The Contracting Authority is committed to the principles of environmental management in its activities, and it encourages the implementation of sustainability principles in its procurement practices. Tenderers/contractors should make all reasonable efforts to minimise adverse environmental impact in the methods of services delivery and in materials used.

(ee) Accessibility

In line with the Disability Act 2005, accessibility requirements should be clearly stated in request for tenders / quotations where applicable. Under Section 27 of the Act the Contracting Authority is required to ensure that both the goods supplied, and services provided to it are accessible to persons with disabilities.

(ff) Knowledge and Skills Transfer

It will be a condition of the contract that opportunities for the transfer of skills and/or knowledge from the Tender/Tender's staff to the Contracting Authority staff will be availed of during the course of the contract or prior to the handing over of the finished work/product.

(gg) Collusive Tendering

If any Tendering Party is found to have, at any time, offered to give or to have agreed to offer or give to any person, any bribe, gift, gratuity, commission or consideration of any kind as an inducement or reward for taking or forbearing to take any action in relation to the obtaining of its Tenders, or for showing or forbearing to show any favour or disfavour to any person in relation to its Tenders, the bid submitted by such Tendering Part shall be automatically disqualified and the circumstances surrounding such action shall be referred to the appropriate authority.

(hh) Change in the Composition of a Tender

The Contracting Authority reserves the right, but is not obliged, to disqualify any Tenderer that makes any change to its composition after submission of a Tender.

(ii) Consortia and Prime Subcontractors

The Contracting Authority seeks to encourage participation on a fair and equal basis by Small and Medium Enterprises ("SME"s) in this Competition. SMEs that believe the scope of this Competition is beyond their technical or business capacity are encouraged, subject to this paragraph, to explore the possibilities of forming relationships with other SMEs or with larger enterprises. Through such relationships they can participate and contribute to the successful implementation of any Services Contracts that may result from this Competition and therefore increase their social and economic benefits.

Larger enterprises are also encouraged, subject to this paragraph, to consider the practical ways that SMEs can be included in their proposals to maximise the social and economic benefits of any Services Contracts that may result from this Competition.

Where a group of undertakings (in whatever form and regardless of the legal relationship between them) come together to submit a Tender in response to this RFT the the Contracting Authority will deal with all matters relating to this Competition through the entity who will carry overall responsibility for the performance of the Services Contract only (the "Prime Contractor"), irrespective of whether or not tasks are to be performed by a subcontractor or other consortium member (the "Subcontractor"). The Tenderer must clearly and comprehensively set out the name, title, telephone number, postal address, facsimile number and email address of the nominated contact personnel of the Prime Contractor authorised to represent the Tenderer and to whom all communications shall be directed and accepted until this Competition has been completed or terminated. Correspondence

from any other person (including from any Subcontractor) will NOT be accepted, acknowledged or responded to.

(jj) Anti-Competitive Conduct

Tenderers attention is drawn to the Competition Act 2002 (as amended, the “2002 Act”). The 2002 Act makes it a criminal offence for Tenderers to collude on prices or terms in a public procurement competition.

(kk) Data Protection

Data Protection Laws” means all applicable national and EU data protection laws, regulations and guidelines including but not limited to Regulation (EU) 2016/679 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (the “General Data Protection Regulation”), the Data Protection Act, 2018 and any guidelines and codes of practice issued by the Data Protection Commission or other supervisory authority for data protection in Ireland from time to time.

The Contracting Authority will be a Controller (where Controller has the meaning given under the Data Protection Laws) in respect of any Personal Data (where Personal Data has the meaning given under the Data Protection Laws) required to be provided by the Tenderer in response to this Request for Tender.

The Tenderer, as Controller in respect of any Personal Data provided by it in its Tender, is required to confirm by way of statement in the “Declarations” section of the accompanying Tender Response Document that all Data Subjects (where Data Subject has the meaning given under the Data Protection Laws) whose Personal Data is provided by the Tenderer have consented to the processing of such Personal Data by the Tenderer, the Contracting Authority, the Evaluation Team and the supplier of the etenders.gov.ie website, for the purposes of the participation of the Tenderer in this Competition or that the Tenderer otherwise has a legal basis for providing such Personal Data to the Contracting Authority for the purposes of its participation in this Competition.

(ll) Publicity

Tenderers shall not undertake (or permit to be undertaken) at any time, whether at this stage or after the award of the agreement, any publicity activity with any section of the media in relation to this tender/agreement other than with the prior written consent of the Contracting Authority. Such consent shall extend to the content of any publicity. For the purposes of this paragraph, the word “media” includes (but is not limited to) radio, television, newspapers, trade and specialist press, the Internet and e-mail accessible by the public at large and the representatives of such media.

The Contracting Authority will have the right to publicise or otherwise disclose to any third-party information regarding this process and the agreement.

APPENDIX 2 – FORM OF TENDER



APPENDIX 3 – RESOURCE ALLOCATION SCHEDULE

APPENDIX 4 – FRAMEWORK AGREEMENT TERMS AND CONDITIONS

APPENDIX 5 – THE CONTRACTING AUTHORITY TERMS AND CONDITIONS

Refer to attached folder containing the following;

- 1) Lead Consultant Appointment including
 - a. Appointment of Assigned Certifier
 - b. PSDP Appointment
 - c. Subconsultant Appointment
- 2) Early stage short form Appointment.

For clarity – the short form agreement will only be used for master planning/ early stage use, the Short Form agreement is not applicable for Cromcastle. Each mini-competition tender issue will indicate which of the T&Cs noted above will be applicable for that specific competition. Tenderers will have to confirm acceptance of both T&Cs to be placed onto the framework.



APPENDIX 6 – DATA PROTECTION AGREEMENT

To be signed and returned as part of the tender submission

APPENDIX 7 – OUTLINE BRIEF, CROMCASTLE

APPENDIX 8 – FRAMEWORK SCOPE OF SERVICES

APPENDIX 9 – PRICING AND RESOURCE BREAKDOWN



APPENDIX 10 – SCHEDULE OF INSURANCES & SERVICE INSURANCE QUESTIONNAIRE

To be signed and returned as part of the tender submission

APPENDIX 11 – KEY PERFORMANCE INDICATORS



Outline Brief
for the
Purposes of Architect Led Design
Team Procurement

Cromcastle Road, Coolock, Co.
Dublin

11th August 2021

CONTENTS

1	Introduction	3
2	Background and Site Details	3
2.1	Zoning	4
2.2	Density Target.....	5
2.3	Planning History.....	5
2.4	Adjacent Developments.....	6
3	Outline Sustainable Urban Design Brief	6
4	Project Brief Requirements	7
4.1	Fixed Lump Sum Fee.....	7
5	Tendered Fees.....	8
6	Procurement Considerations for the Design Team	9
7	Programme	11
8	Reference Visuals.....	11

1 Introduction

The purpose of this outline brief is to provide project specific information to tenderers participating in the Lot 2 multi-party framework agreement for Architectural Led Design Team services. The initial project to be tendered under this framework is for the delivery of a new neighbourhood development on lands located in Cromcastle Road, Coolock, Co Dublin.

This outline brief is to be read in conjunction with the *Framework Scope of Services* document and all other tender documentation provided in the Invitation to Tender.

2 Background and Site Details

The site shown outlined in red in Figure 1, is bound to the north by Oscar Traynor Road, to the south by Cromcastle Road and to the east by Kilmore Road. It is situated to the south of the Northside Shopping Centre and to the east of a HSE Primary Care Centre complex. Existing two storey terraced residential units are situated to the south along Cromcastle Road and a large green open space is situated to the east of the site.

The site is approximately 1.8acres and is currently in use as a semi formal grassland park, comprising of pathways and lighting with little planting / trees. There is currently no vehicular access to the site. There is an existing retaining structure at the corner of Oscar Traynor Road and Kilmore Road where the site level drops below road level.



Figure 1 Site Location

The Santry River is located to the north of the site and the area around the river is a Conservation Area.

2.1 Zoning

The site is located within Dublin City Council (DCC). Under the DCC Development Plan 2016 – 2022 the site is zoned Z4 District Centre which are “To provide for and improve mixed-services facilities”.

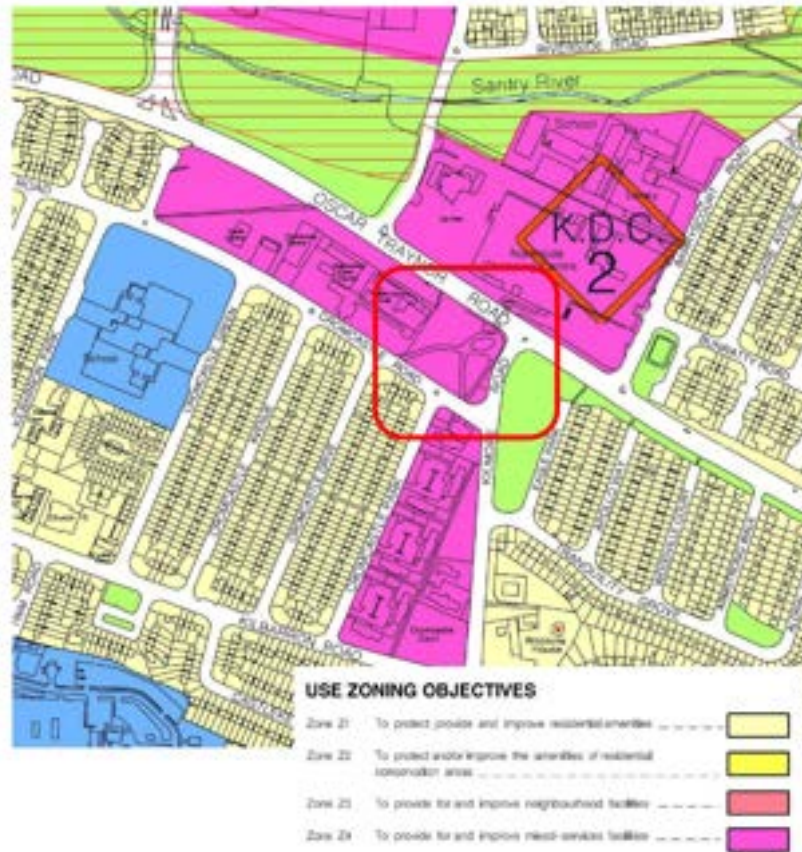


Figure 2 Land Use Zoning

Key District Centres are considered the ‘top tier of urban centres outside of the city centre, these will be strong spatial hubs, providing for a comprehensive range of commercial and community services’. The general development principles for key district centres as defined in the Development Plan are:

- **Population:** Establish significant residential population bases with diversity in unit types and tenures capable of establishing long-term integrated communities.
- **Density:** Ensure the establishment of high-density developments capable of sustaining quality public transport systems and supporting local services and activities. Account should be taken in any such development of any distinct or valuable architectural or historical features that influence the urban form, character and scale of the existing area.
- **Transport:** Ensure provision is made for quality public transport systems. Provide improved access to these systems and incorporate travel plans, which prioritise the primacy of pedestrian and cyclist movement and address the issue of parking facilities and parking overflow.
- **Commercial/Retail:** The creation of a vibrant retail and commercial core with animated streetscapes.
- **Community and Social Services:** The centres will be encouraged to become the focal point for the integrated delivery of community and social services.
- **Employment:** Encourage the provision of mixed-use developments incorporating retail, office, residential and live-work units, and the creation of small start-up units. (The floor area limitations in respect of offices given in the land-use zoning objective Z4 shall not apply in the case of identified key district centres, and applications involving office development in these areas shall be assessed on their merits, taking account of the overall

objective to provide for a mixed-use environment).

- **Built Environment:** The creation of high quality, mixed-use urban districts with a distinctive spatial identity and coherent urban structure of interconnected streets and child-friendly public spaces and urban parks. Development should have regard to the existing urban form, scale and character and be consistent with the built heritage of the area.
- **Capacity for development:** Encourage the development/re-development of under-utilised sites.

The Dublin City Development Plan 2016 – 2022 is available for review at the link below:
<https://www.dublincity.ie/dublin-city-development-plan-2016-2022>.



Figure 3 Zoning Objective Z4 Permissible Uses (Ref Dublin City Development Plan 2016 – 2022)

2.2 Density Target

Options will need to be considered during Stage 1 to establish the optimum density target for the site. Options analysis must take consideration of and report on Sustainable Urban Design Brief requirements as outlined in Section 3 of this document, order of magnitude costs, feasibility, planning requirements including the provision of amenity / other space to meeting zoning requirements and other considerations which may influence the selection of the most appropriate scheme. While it is only on completion of the options analysis that the optimum target density will be determined, it is anticipated that potentially this will lead to in the region of c. 150 homes. There may also be a planning requirement to deliver a nominal amount of non-residential internal ground floor active space.

2.3 Planning History

- The site formed part of a proposal for the development of a new Northside Town Centre which was granted permission on 2nd May 2008 under planning reference no. 5950/07. Planning permission has expired.
- On the adjoining HSE site, planning permission was granted on 14th January 2014 for the demolition of the existing building and construction of a new primary care centre. The planning reference number is 3548/13, permission has expired.

2.4 Adjacent Developments

DCC are developing a Masterplan for Cromcastle Court residential development on adjacent lands to the south of the site. A Public Consultation process took place in Q4 2020, details of which are available at the link below.

<https://consultation.dublincity.ie/north-central-area/cromcastle-court-and-the-old-coal-yard/>

3 Outline Sustainable Urban Design Brief

ALDT's will be asked to demonstrate how they propose to respond to the urban design challenges and opportunities for the subject site with specific reference to the potential for embedding sustainability as a core driver of the design process. Detailed brief development will include specific reference to the following themes and will reference relevant design guidance (statutory & industry best practice standards) and its application, particularly during the early stages of design development and optimisation. ALDT's will need to consider how access, circulation, massing, distribution, orientation, security, and other areas noted below can be optimised in the context of a sustainable design strategy while working within the boundaries of the adopted LAP.

Transport, Access & Circulation Hierarchy

ALDT's will be asked to consider access to and circulation within the site and consider the hierarchy of road surfaces / shared surfaces to give priority for circulation within the site to the pedestrian and cyclist. ALDT's will be asked to consider reduced parking provision, electric car charge points and facilitation of car sharing schemes.

Density, Massing & Distribution

With reference to the principles established in the Dublin City Development Plan, ALDT's will be asked to provide options to explore the potential for the site within the density targets outlined in section 2.2 expressed as both units per hectare & population density per hectare. Design teams will be required in the early stages of brief development to demonstrate through graphic materials, text and other materials as appropriate how massing and distribution of building elements will be informed by their analysis of the site-specific challenges and opportunities arising. ALDT's will be required to reference relevant design standards for site planning for daylight & sunlight and indicate how the use of these tools will be integrated into their design process from the earliest stages.

Biodiversity & Amenity

ALDT's will be asked to provide an overview of baseline surveys required and how these will inform their understanding of the wider context and opportunities for biodiversity & ecological enhancement. ALDT's should ensure that effective communication & coordination between the ecologist, landscape architect and civil engineer is embedded in the design process in order to analyse and develop proposals for the potential for use of green infrastructure to address surface water run off & attenuation and enhance amenity & biodiversity value on site. ALDT's will be asked to prioritise the use of native species in planting schemes including establishment and/ or enhancement of native hedgerows at appropriate densities and mixes to facilitate the interlinking of nature through public, semi public and private amenity spaces. Coordination of the inclusion of nesting and roosting potential e.g. swift boxes, bat boxes etc into boundary wall treatments, building facades and planted areas will be the responsibility of the landscape architect working with the Ecologist who should advise the design team.

Building Form, Orientation, Construction Methods & Outline Design Performance Objectives

ALDT's will be asked to ensure that design for daylighting is incorporated at the appropriate stage of project development. The failure to adopt an appropriate daylight and sunlight strategy, and design process will not only affect the qualitative outcome of LDA developments but may also present a planning risk. Design Teams will also be asked to give consideration to the relationship between built form, reduced energy demand and optimised glazing design required to achieve affordable, healthy, comfortable and safe environments for tenants. This should include an indication of the potential for an energy demand reduction approach to building design with reference to best practice internationally recognised design / certification standards in excess of NZEB requirements. Tenderers may suggest a number of different standards which they deem to be appropriate to the building typology and should include details of the personnel, experience and skillset, within the proposed Design Team to embed the integration of the design performance objectives into the design development process. It will be a requirement to demonstrate an understanding of how water demand reduction strategies can be incorporated into design proposals. ALDT's will also be asked to explore and report on the potential for the application of MMC solutions at various scales across the site.

Site Energy / Services Master-planning

ADLT's will be asked to consider the development and integration of a site energy strategy into the site masterplan, building design and landscape design. The development of the detailed brief will include exploring the potential for centralised plant and district heating systems within the proposed masterplan area or parts thereof and the impacts and opportunities presented by such an approach relative to the varying scales and development typologies/ uses across the site.

ALDT's will be requested to complete cost benefit exercises on sustainable design solutions to inform Client decisions.

4 Project Brief Requirements

4.1 Fixed Lump Sum Fee

This project shall be priced by the Architect Led Design Team as a fixed price lump sum fee.

The below descriptive scope is for pricing guidance only. The more detailed anticipated scope of service relevant to each project stage is set out within the *Framework Scope of Services* document.

Planning Application Stage 1:

Fixed Lump Sum Fee to reflect:

- Masterplan, preliminary design, feasibility and development of scheme design & associated information to submission of a valid planning application to the Local Authority, Project Stages 1a and 1b in accordance with the *Framework Scope of Services*, to include:
 - Collation and review of current information relating to the site, including the LAP.
 - Undertaking of feasibility studies, masterplan and reporting with recommendations for the development.
 - Participation / engagement with stakeholders to include the Contracting Authority, the Local Authority, Councillors, the Local Community and other interested stakeholders.
 - Design development and lodgement of a valid Planning Application to the Local Authority for the site any required key enabling infrastructure, and all associated stakeholder engagements.
 - Coordinating and paying for site notices and newspaper advertisements.
 - Responding to queries during the Planning process.

- Tenderers should include for responding to a Further Information request from the Local Authority post lodgement of the planning application.

In the event that additional services are required as a result of the Local Authority planning decision being appealed to An Bord Pleanála, the extent of these services may be agreed with the LDA on a time basis at the tenderers submitted hourly rates.

Post Grant of Planning through to Construction & Handover Stages 2-5. Described as:

- Delivery of the residential development in line with the Planning Permissions granted on a traditional contract basis (i.e. Employer designed, with the Architect acting as Employers Representative), services to include detailed design, securing statutory approvals, tender action, evaluation and award in compliance with Public Procurement rules, construction, handover & defects period. Refer to project Stages 2-5 of the Framework Scope of Services for full details of the expected service requirements.

Fixed Lump Sum Fee to reflect:

- Detail design development.
- Statutory Approvals (e.g. DAC / FSC) including associated stakeholder engagement & taking into consideration and inclusion of future provisions.
- Procurement strategy/planning and implementation in compliance with Public Procurement rules.
- Employers Representative & Team Monitoring roles during project implementation,
- Inspections & certifications in accordance with BCAR.
- Handover and Defects period.

Note: The Contracting Authority reserves the right not to proceed with any or all of the above listed items above and also reserves the right to terminate the contract at any point throughout the project.

5 Tendered Fees

It is anticipated that payment of fees for Stage 1 will be based on the following split:

- Stage 1a 35% of Stage 1 Fee, paid on a monthly basis across the duration of the stage 1a programme, on valid delivery of services
- Stage 1b 65% of Stage 1 Fee, with 60% paid on a monthly basis across the duration of the stage 1b programme, on valid delivery of services, and the remaining 40% paid on lodgement of a valid planning application

For Stage 2 -5 a payment schedule will be agreed with the successful tender in advance of stages commencing.

Note for the Cromcastle project the role of Assigned Certifier is not part of the Architect Led Design Team and will be separately procured by the Contracting Authority.

6 Procurement Considerations for the Design Team

6.1 The design team will need to include as part of their services and include in their tendered fees the costs of the following specialised services as deemed necessary.

The following sample list is non exhaustive:

- Appropriate Assessment screening report (full AA excluded / NIS excluded, unless already known they are required).
- Environmental Impact Assessment screening report.
- Ecological Impact Assessment with associated initial biodiversity surveys.
- Initial biodiversity surveys including bat study, invasive species report, winter bird and summer bird survey as applicable.
- Construction and Environmental Management Plan.
- Construction and Operational Waste Management Plan.
- Landscaping Visual Impacts Assessment & Graphics (incl. verified views and CGIS).
- Photomontages
- Sunlight & Daylight Modelling - Impact Studies & Report
- Road Safety Audit
- Building Conservation Report / Built Heritage Report
- Archaeology Report
- Digital Ordnance Survey-licensed tiles
- Declarations of identity for boundary confirmation
- Creche report
- Schools capacity report (if an additional report is required)
- Wind Modelling & Report

6.2 *The design team will need to include as part of their services, and include in their tendered fees, for the procurement, appointment, co-ordination and management of the following specialist services, as necessary.*

The Contracting Authority will reimburse the cost of the specialist services as appropriate (A Provisional Sum of €100,000 for reimbursing the cost of these specialist services is to be included in the ALDT's tender and is pre-populated in the Pricing and Resource Breakdown excel document). The following sample list is non exhaustive:

- Ground / Geotechnical Investigations (including Soil Infiltration Tests)*
- Waste Acceptance Criteria Assessment*
- Archaeological Test Trenching & Monitoring*
- Topographical Survey*
- Utilities Survey (including GPR survey)*
- CCTV Survey (if required)*
- Pressure Testing Watermains (if required)*
- Traffic Survey
- Asbestos Survey (if required)*
- Contaminated Land & Remediation Specialist (if required)*
- Noise, dust and vibration monitoring and modelling (if required)*
- Tree Survey & Report
- Measurement and condition surveys of existing structures*
- Air quality monitoring and modelling (if required)*

* *Tenderers should note, in addition to the requirements set out above, for items in the*

above list highlighted with an asterisk the ALDT shall be responsible for identifying the issues to be addressed in each survey and for making relevant information available to each survey provider, as well as managing the timely delivery of the surveys. The ALDT shall ensure that each survey is addressed to the LDA and will allow the LDA to rely upon the report (and the accuracy of the same). Save as expressly set out here, the ALDT shall not be responsible for the content of any of these surveys (highlighted above by asterisk) prepared by third parties.

6.3 The design team will need to include as part of their services, and include in their tendered fees, for the procurement, appointment, co-ordination and management of a consultation & communication support services provider to provide the following services, as necessary.

The Contracting Authority will reimburse the cost of the consultation and communication support services provider services as appropriate (A Provisional Sum of €40,000 for reimbursing the cost of these specialist services is to be included in the ALDT’s tender and is pre-populated in the Pricing and Resource Breakdown excel document).

Phase A	Initial Communication	<p>Initial communications to set out the context of the proposed development, introduce the LDA and the Design Team, provide the history of the development of the overall area and a provide links and detail of the LAP already developed. Key activities at this Phase are:</p> <ul style="list-style-type: none"> • Setup and pay for website including branding and content. • Prepare initial survey, collate and analyse responses • Develop flyer and posters, printing and distribution • Proactive social media • Setup and monitoring of dedicated email address
Phase B	Proposal Engagement	<p>This phase is intended to add a layer of detail to the initial information presented in Phase A and provide an opportunity for stakeholders to engage with the more detailed proposals for the proposed development. Key activities proposed in this Phase are:</p> <ul style="list-style-type: none"> • Update the website with design concepts for the proposed development from the design team and a more detailed survey • Create virtual event room • Proactive, targeted outreach to key stakeholders • Develop and present narrative around initial survey responses • Update stakeholder consultation timeline • Develop further survey with Design Team and incorporate into website, collect feedback • Key stakeholder briefings • Continued social media posting • Continue monitoring of dedicated email address • Public event / online event • Set up physical drop off point for surveys to be returned in a letterbox, collection of same (to be agreed with DCC)
Phase C	Proposal Update Engagement	<p>This phase is to provide updated design proposals for the development prior to completion of planning process to inform the public and stakeholders. Key activities in this Phase will be:</p> <ul style="list-style-type: none"> • Update website and virtual rooms • Host virtual event (or public event if restriction allow for it) • Develop survey feedback narrative and co-ordinate with updated design • Develop, print and distribute updated flyers and posters • Outreach events • Continued social media posting • Continue monitoring of dedicated email address

7 Programme

The Architect Led Design Team lead in conjunction with the Project Manager (separate appointment by the Contracting Authority) will be responsible for establishing the Project Timelines and ensuring all design team parties are on track to meet the agreed dates.

The anticipated indicative duration of each stage is outlined below, with every effort being made to improve upon this timeframe. It is estimated that the construction stage will be delivered in two phases, the design team will be required to provide services to certify the project to facilitate use, at completion of each phase. The design should facilitate phasing during construction.

Stages of Development (As per Framework Scope of Service)	Anticipated Duration
Stage 1A&B	14 months
Stage 2	8 months
Stage 3*	7 months
Stage 4	24 months (2 phases assumed)
Stage 5	12 months DLP period
*Does not include prequalification process which could potentially overlap with Stage 2.	

All timings are indicative and are subject to final agreed program. All effort should be made to reduce the programme where appropriate.

It is envisaged that all Project Stages will be carried out expeditiously and within normal market delivery timeframes.

8 Reference Visuals



Site





Architect Led Design Team – Outline Brief
Cromcastle Road







Professional Services
Architect Led Design Team for
Land Development Agency

Framework Scope of Services

June 2021

Table of Contents

1	Services Required.....	4
1.1	Overview	4
1.2	Safety, Health & Welfare	4
1.3	Building Control (Amendment) Regulations 2014	4
1.4	Team Disciplines.....	6
1.5	Drawing Deliverables	12
1.6	Specialist Services	13
1.7	Project Stages.....	14
2	Stage 1a – Feasibility, Urban Design / Masterplan & Outline Design Stage	15
2.1	Architectural Services and Architectural Services – Masterplan and Urban Designer	15
2.2	Mechanical & Electrical Services.....	17
2.3	Quantity Surveyor Services	18
2.4	Civil & Structural Engineering Services	19
2.5	Landscape Architectural Services.....	20
2.6	Project Supervisor Design Process (Health & Safety PSDP) Services	21
2.7	Planning and Environmental Consultancy Services	22
2.8	Traffic & Transport Services	23
2.9	Archaeology Consultancy Services.....	24
3	Stage 1b – Preliminary Design and Planning Application Stage	26
3.1	Architectural Services	26
3.2	Architectural Services – Masterplan and Urban Designer	26
3.3	Mechanical & Electrical Engineering Services.....	27
3.4	Quantity Surveyor Services	28
3.5	Civil & Structural Engineering Services	29
3.6	Landscape Architectural Services.....	30
3.7	Project Supervisor Design Process (Health & Safety PSDP) Services	30
3.8	Planning and Environmental Consultancy Services	31
3.9	Traffic & Transport Services	31
3.10	Archaeology Consultancy Services.....	32
4	Stage 2 – Detailed Design and Statutory Approvals	33

4.1	Architectural Services	32
4.2	Quantity Surveyor Services	34
4.3	Mechanical & Electrical Engineering Services.....	36
4.4	Civil & Structural Engineering Services	38
4.5	Landscape Architectural Services.....	39
4.6	Project Supervisor Design Process (Health & Safety PSDP) Services	40
4.7	Planning and Environmental Consultancy Services	40
4.8	Traffic & Transport Services	41
4.9	Archaeology Consultancy Services.....	41
4.10	Assigned Certifier	42
4.11	Design and Ancillary Certifier(s).....	42
Stage 3 – Tender Action, Evaluation, Award.....		43
5.1	Architectural Services	43
5.2	Mechanical & Electrical Engineering Services.....	43
5.3	Quantity Surveying Services.....	43
5.4	Civil & Structural Engineering Services	46
5.5	Landscape Architectural Services.....	46
5.6	Project Supervisor Design Process (Health & Safety PSDP) Services	46
5.7	Planning and Environmental Consultancy Services	47
5.8	Traffic & Transport Services	47
5.9	Archaeology Consultancy Services.....	47
6	Stage 4 – Construction	48
6.1	Architectural Services	48
6.2	Mechanical & Electrical Engineering Services.....	50
6.3	Quantity Surveying Services.....	52
6.4	Civil & Structural Engineering Services	53
6.5	Landscape Architectural Services.....	55
6.6	Project Supervisor Design Process (Health & Safety PSDP) Services	56
6.7	Planning and Environmental Consultancy Services	56
6.8	Traffic & Transport Services	56
6.9	Archaeology Consultancy Services.....	56

6.10	Assigned Certifier	57
7	Stage 5 – Handover and Defects Period	58
7.1	Architectural Services	58
7.2	Mechanical & Electrical Engineering Services.....	58
7.3	Quantity Surveying Services.....	58
7.4	Civil & Structural Engineering Services	60
7.5	Landscape Architectural Services.....	60
7.6	Project Supervisor Design Process (Health & Safety PSDP) Services	61
7.7	Planning and Environmental Consultancy Services	61
7.8	Assigned Certifier	62
7.9	Multi-Disciplinary Services on Handover	62
7.10	Final Account Report Supplement	62
8	General Services for All Stages.....	63
8.1	Fire Safety Engineering	63
8.2	Disability Access Engineering	67

1 Services Required

1.1 Overview

This scope of the services document covers the feasibility, master-planning, preliminary design, planning application, detailed design, procurement of works contractor(s), contract administration, works supervision and handover of Project Stages of the project summarised in Section 1.6 and more particularly described in Sections 2 to 7.

The Architect Led ALDT (“ALDT”) will be responsible for providing all planning and construction-related technical advice, including Master-planning design services to the Contracting Authority A (“CA”) in respect of the project.

The ALDT will be required to liaise with the CA’s Project Manager, Property Advisor and other relevant appointed consultants, as required in the delivery of their services. The ALDT will be required to progress site feasibility studies, design studies and master planning demonstrating vision while being sensitive to the surrounding environment. The ALDT consultants will be required to provide services included in this Scope of Services document for the Project Stages.

The consultant team must perform their duties professionally, adequately, efficiently and in accordance with best practice and ethics to achieve the outputs required.

The consultant team must carry out all works in accordance with the current applicable procedures as set out in the Capital Works Management Framework documents as set out by Department of Public Expenditure and Reform and in compliance with EU and Irish legislation.

This Scope of Services document is to be read in conjunction with the Outline Brief and the Tender documents issued with the relevant request for mini-tender.

1.2 Safety, Health & Welfare

The ALDT shall address all issues related to health and safety that may be associated with the design and works and shall perform its duties in accordance with the Safety, Health and Welfare at Work Act 2005 and the Safety, Health and Welfare at Work (Construction) Regulations 2013, including the oversight of all CA obligations under the regulations. All ALDT members shall provide timely inputs into all necessary health, safety & welfare documentation including design risk assessments, preliminary and final health and safety plans and review of risk assessments and method statements.

1.3 Building Control (Amendment) Regulations 2014

Carry out the role of Design and Assigned Certifier and associated duties as required under the Building control (amendment) Regulations 2013-S.I. No 80 of 2013, S.I. No 9 of 2014 or any subsequent update in line with the agreed format of the ancillary certs and in accordance with Code of Practice for Inspecting and Certifying Buildings and Works; Building Control Regulations 2014

As a minimum this should include:

- Liaise with Employer, Project Manager and Design Team to understand the history, status and delivery programme for the project,
- Liaise with Employer, relevant Stakeholders, Project Manager and appointed Consultants / Contractors to deliver the Service,
- Develop a methodology for implementation of the Building Control (Amendment) Regulations (BCAR) on the project
- Develop a detailed inspection plan, taking account of any phasing required for the specific project,
- Inspect, and co-ordinate the inspection activities of others during construction, and certify the building/works on completion,
- Provide, sign and lodge the relevant statutory certificates - the form of undertaking at Commencement and the Certificate of Compliance on Completion.
- Provide a Monthly Progress report for the client including elemental BCAR signoff as the project progresses, to include:
 - Update on certificates received or outstanding
 - Variance/non-conformance with the inspection plan
 - % of Inspection plan and updated live progress report of inspections

The Architect will be required to act as design certifier for the project in accordance with the Building Control (Amendment) Regulations 2014.

The Architect and sub consultants will be required to provide Ancillary Certificates for the project in accordance under the Building Control (Amendment) Regulations 2014.

The CA will act as Building Owner under the Building Control Act 2014 and be responsible for paying Commencement Notice fees.

The ALDT will exercise all reasonable skill, care, and diligence to ensure that the buildings are designed and constructed in accordance with the relevant requirements of the Building Regulations. The persons assigned by them should be competent for the work they undertake.

All ALDT members will provide services and will be responsible for undertaking all activities required by designers in accordance with the Building Control Regulations 2014 as set out in the Code of Practice for Inspecting and Certifying Buildings and Works (2014):

- (a) design their respective elements of work in accordance with the applicable requirements of the Second Schedule to the Building Regulations.
- (b) provide the Design Certifier with the necessary plans, specifications and documentation that is required for lodgement at commencement stage.
- (c) arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
- (d) as agreed with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the Design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.

- (e) notify the Assigned Certifier of their proposed inspection regime for inclusion in the overall Inspection Plan.
- (f) provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier; and
- (g) maintain records of inspection.

1.4 Team Disciplines

The ALDT services will cover the following disciplines:

1.4.1 Design Team Leader

The Architectural services consultant will be the Design Team Leader (“DTL”) for all stages and will act as the single point of contractual responsibility, with the remaining key disciplines providing collateral warranties for the benefit of the CA. The Project Architect shall take overall responsibility of the ALDT and be wholly responsible for the provision of consultancy services provided by the ALDT.

The DTL will (1) coordinate the development of all design information produced by the ALDT, ensuring the production of high quality information; and (2) coordinate the activities of individual ALDT members and staff in order to efficiently deliver the services within timeframes as agreed with the CA. A senior representative of the Project Architect will be identified as the individual responsible for ensuring the role of the DTL is effectively implemented in all tenders.

The DTL shall take all instructions from, and engage with, the CA and the CA’s appointed representatives to review CA procedures and design standards to ensure adherence by the ALDT and shall act on behalf of the CA throughout the project. The DTL shall obtain permission from the CA to start each stage of the services. The DTL shall determine lines of responsibility between all ALDT members including inputs and lines of communication, reporting formats and programme each work task for all stages. The DTL shall ensure all ALDT design information is being distributed and stored appropriately via the CA’s online electronic document management system.

Each team will be required to use a common data environment for sharing project information with the design team, the LDA and specific stakeholders. The LDA is currently using the BIM 360 platform and will develop a Folder Security Matrix for each Call-off Contract. A member of the design team either the Design Team Leader or Project Manager will be requested to purchase a package of licences for each individual project. It will be the responsibility of the DTL to ensure that all ALDT members are utilising BIM 360 in a coordinated manner and in accordance with LDA document management procedures.

The DTL will be required to support the CA in managing communications with all relevant stakeholders involved in the Project. including, inter alia, planning authorities, local authorities, utility companies, adjacent landowners, developers, management companies, neighbours, statutory bodies, government departments and resident groups. LDA to pre-approve all formal communications with statutory bodies.

1.4.2 Architectural Services

The Project Architect will be required to provide all of the professional architectural services (including the specialist skills listed below) as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project. Specialist skills required are:

- a) Conservation Architect
- b) Fire Safety Design Services
- c) Disability Access Design Services
- d) Employer's Representative for the Works Contract
- e) Assigned and Design Certifier services as defined under the Building Control (Amendment) Regulations 2014
- f) Landscaping & Visual Impact Assessment (LVIA) and Graphics (including verified views and CGIS)
- g) Topographical surveys, asbestos and Measured Building Surveys of existing buildings
- h) Acoustics
- i) Sustainability Specialist(s) will be a design led role based on an energy demand reduction strategy to include advice on site planning, building fabric, developing design performance objectives & coordination of M&E inputs with architectural design as well as analysis and optimization of embodied carbon (EN15978 A1-A5) and whole life carbon (EN 15978 A1-C4) impacts of proposed construction methodologies at the appropriate project stage. Specialist should be accredited in certification of at least one of the industry-wide building energy efficiency standards/ optimization tools such as Well Building Standard, Passive House, HPI, One Click LCA etc & a have working knowledge of these standards sufficient to be able to seek and coordinate specialist advice if necessary into the design process as required to meet the agreed design performance objectives of the detailed client brief. Scope will include modelling, calculations, reporting, tender specification, drawings, site inspections and advice as required to demonstrate compliance with the agreed design performance objectives (including but not limited to energy in use, daylighting, embodied carbon & whole life carbon) for the project up to stage 5 (handover) and including input to and management of the 3rd party certification process where relevant.
- j) Site boundary identification and verification including statutory declarations of identity where required by the CA
- k) Building Surveys where required and unless otherwise stated are part of the duties of the Architect and relevant disciplines.

1.4.3 Architectural Services - Masterplan and Urban Designer

The aim of the development is to create a vibrant and varied community to provide residential & support facilities with links to the surrounding areas. In addition, environmental improvements to ensure linkages with the surrounding locality is a further key objective with the creation of strategic urban open spaces etc.

The ALDT are required to:

- Act as consultant for the design master plan for the development of the site, to include new housing, new open spaces and new community facilities; provide such drawings, 3-D models and views and reports as required to describe the plan; and participate in public display and presentations to the relevant stakeholders
- Advise on the development and interaction with community facilities (including local retail and leisure etc.)

- Examine and make recommendations for working with the proposed mix of tenure on the lands to create a sustainable model going forward. Advise on the distribution of tenures.
- Develop an integrated urban design strategy covering local transportation, cycling, movement and parking; streetscape and the public realm; place-making; boundaries and edges; integration of features; retention of trees and enhancement of tree planting; appropriate materials and building forms.
- Identify urban design characteristics for each block/zone within the masterplan lands.
- Provide a public realm design guide for use throughout the Masterplan areas
- advise on phasing and social sustainability issues.
- consideration of residential mix, form, massing, and density
- consideration of Social Sustainability
- consideration of energy requirements and efficiencies / sustainable dwellings & urban realm / Green Infrastructure
- Vehicular, cycle and pedestrian access to and from the site
- Transportation, movement, and parking are to be designed, so far as possible in accordance with the Design Manual for Urban Roads and Streets (DMURS) published by the Department of the Environment.
- Designers should advise and make design proposals generally for place making and public realm improvements generally.
- Liaise with residual team members to examine impact / limitations of the scheme vis-à-vis existing utilities and services.

The Master Planning / Urban Designer will be required to work closely with all members of ALDT and the CA's appointed consultants.

1.4.4 Civil & Structural Engineering Services

The Civil/Structural Engineer shall provide all of the professional engineering services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project.

The Civil & Structural Engineer will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.5 Mechanical, Electrical & ICT Engineering

The Mechanical & Electrical Engineer shall provide all of the Mechanical, Electrical and Information Communications Technology services consultancy services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the Project. These services may include specialist energy design, evaluation and input into certification services, e.g., BER, Passive, LEED, BREEAM, Wired-Score.

The M&E Engineer will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of M&E services during all project stages and to adopt an energy efficient design approach.

1.4.6 Quantity Surveyor

The QS shall provide professional quantity surveying services as necessary to comply with the Contracting Authority's (CA) instructions and to ensure a satisfactory completion of the Project. The

Quantity Surveyor shall engage directly with and act on behalf of the client to ensure accurate cost planning and ongoing monitoring of expenditure to ensure that the project is executed within the approved budget. The QS will provide information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.

The QS is to liaise with the design team, Project Manager (PM), Property Advisor, and relevant appointed consultants in addition to the LDA Development Manager (LDA DM) / Project Managers (LDA PM) and other LDA Stakeholders, including planning, legal, insurance and commercial advisors as required in the delivery of their services.

1.4.7 Landscape Architectural Services

The Landscape Architect shall provide all of the professional landscape architectural services as necessary to comply with the CA instructions and to ensure a satisfactory completion of the Project.

The Landscape Architect will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.8 Project Supervisor for the Design Process

The Project Supervisor for the Design Process shall provide all of the professional PSDP services as necessary to comply with their responsibilities under the Safety, Health & Welfare at Work (Construction Regulations)

2013, the CA instructions and to ensure a satisfactory completion of the Project.

The PSDP will be required to work closely with the DTL and the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient approach.

1.4.9 Planning and Environmental Consultancy Services

The Planning and Environmental Consultant shall provide all of the professional services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project. Specialist skills required as follows / associated with the following:

- a) Expert planning advices
- b) Contaminated Land & Remediation Specialist / Construction & Demolition Waste Management Plan (C&D WMP)
- c) Asbestos Specialist d) Noise Specialist
- e) Air Quality Specialist f) Ecology
- g) Mammal Expert
- h) Ornithologist
- i) Sunlight and Daylight Impact Studies and Report
- j) Wind report
- k) Appropriate Assessment Screening and if required Natura Impact Statement.
- l) Environmental Impact Assessment and/or Statement
- m) Environmental Impact Assessment Report
- n) Ecological Impact Assessment
- o) Bat Specialist
- p) Arborist / Tree Specialist

Note a number of physical site surveys will form part of the ALDT services as noted in section 1.6 below.

The Planning and Environment Consultant will be required to work closely with the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an energy efficient.

Key tasks for the successful planning consultant during the project are:

- Arrange, chair and minute meetings with the Local Authority. Circulate the minutes of such meetings to the Client and Project Manager.
- Carry out such services as you consider necessary to maximise the Client's chances of obtaining planning permission for the development.
- Reviewing on an on-going basis the developing design to ensure that it is compatible with the requirements of the Planning Authority. Advising on areas of divergence.
- Provide a copy of the planning permission and any discharge of condition notices to the Client and Project Manager promptly
- If required, input to the report at the completion of any work stage in advance of completion of such "work stage".

1.4.10 Traffic & Transport Services

The Traffic & Transport Consultant shall provide all the professional consultancy services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project.

The Traffic & Transport Consultant will be required to work closely with the architect to ensure that traffic management, parking, and traffic impact considerations (including before and after analysis) are incorporated in the overall design.

The Traffic & Transport Consultant will be required to work closely with the Quantity Surveyor on the cost implications of their element of the Project during all project stages and to adopt an efficient design approach.

1.4.11 Archaeology Services

The Archaeologist shall provide all of the professional services as necessary to comply with the CA's instructions and to ensure a satisfactory completion of the project.

1.4.12 Technical Advisory Services

The services included herein are described on the basis that the ALDT will provide these services directly to the CA. However, the CA reserves the right to under any Call-Off Contract to novate the ALDT or any member of the ALDT to a construction contractor. In the event that any Call-off Contract proceeds on the basis of a design and build form of construction contract and the ALDT, or any part thereof, is not novated to the successful main contractor(s), the ALDT shall provide Technical Advisory services to the CA in order to, inter alia, ensure that the developed detailed design information as prepared by the construction contractor(s) shall continue to meet or exceed the CA's brief and technical requirements. The ALDT will be required to establish appropriate performance specifications and to provide all services necessary to review and certify (to the CA) the contractors' design on a timely basis. Where this requires a reduction in the scope of services being provided, a variation will be issued, and the price reduction shall be determined following negotiation and based on the applicable hourly rates. It should be noted Project Supervisor for the Design Process will not be novated to a construction contractor.

1.4.13 Due Diligence Services

The CA will be actively seeking investment opportunities in completed developments and therefore will require multi-disciplinary technical due diligence services on all aspects of completed developments to support CA and/or other funder commitments.

The requirement for due diligence services will be defined in the mini tender project brief.

- The ALDT may be required to work with the LDA and appointed, QS, Property/ Valuation, Legal and Other Advisors to complete comprehensive due diligence which will include, but is not limited to:
 - Commentary on asset and site characteristics (features inside site boundary) including overall scheme assessment, planning, unit typologies, number of 1/2/3 beds etc., development specification, unit standards and site amenities.
 - Assessment and commentary regarding viability to include:
 - Value for money,
 - Net and gross internal area including evaluation of ratios,
 - Design and cost efficiency with particular reference to layouts, bed spaces, building aspect, parking (spaces & location), private amenity space, communal amenity space, ceiling heights, fit out / furniture and specifications.
 - Environmental considerations
 - Transport and accessibility
 - Services and utilities
 - Assessment of operational costs
 - Level of affordability (rental levels / affordability threshold / future sales levels)
 - Capital requirements
 - Delivery programme & timelines
 - Sensitivity / Risk analyses
 - Other viability requirements as required
- The ALDT may be required to prepare example internal layouts as part of the due diligence process.
- Provide advice in relation to technical clauses and development specifications for inclusion in contracts.
- Provide a comprehensive due diligence report.

1.4.14 Project Monitoring Services

The requirement for project monitoring services will be defined in the mini tender project brief. If required, the following scope of service will apply:

- Ensure the interests of the LDA are protected.
- Work as part of a technical monitoring team to ensure a successful outcome for the project and completion of the development in accordance with the:
 - development agreement / other legal agreement(s),
 - all relevant laws and regulations,
 - project programme and budget
 - quality requirements defined in the development agreement.
- Provide technical advice in relation to contractual clauses and development specifications for inclusion in contracts.
- Liaise and support the LDA project team (LDA DM, PM, legal, commercial, property etc) as required in the execution of legal agreements.

- Provide monthly technical reports on project progress.
- Prepare reports and documents as required by or on behalf of the CA.
- Challenge, review, comment and provide recommendations in relation to proposals put forward by the appointed delivery team in relation to design, changes / variations etc.
 - Evaluate any technical change orders / variations proposed and recommend for completion.
- Attend meetings with the appointed delivery team in addition to meeting with the CA monitoring team.
- Review the proposed designs and challenge these designs to ensure the most cost effective and efficient solution is developed.
- Complete regular site inspections to ensure progress is in compliance with the development agreement / any associated agreements.
- Ensure compliance with any technical obligations of the contract at handover / PC.
- Provide a recommendation for release of any retention / final payments in consultation with the QS.
- Support the operational team in appointing maintenance contractors on completion of the works.
- Operate from and comply with third party document management systems as required to facilitate communication with the delivery team. Upload project documentation on to the LDA documentation management system for record.

1.5 Drawing Deliverables

As a minimum all project drawings will be delivered in 2D using AutoCAD or similar software. Some projects may be required to be delivered using BIM, where the design team are required to design in 3D to facilitate this process this will be defined in the project mini tender. Information manager and BIM Coordination Services are noted as a specialist services in section 1.6.

As noted in section 1.4.1 all teams will be required to use BIM 360 as the common data environment for the project, this platform will be used for all projects regardless of the format of drawing information.

1.6 Specialist Services

Specialist Services to be provided by ALDT and included in mini tenders (as applicable)	Specialist Services to be procured and coordinated by the ALDT (including all necessary documentation such as Preliminary Safety, Health & Welfare Plan) and reimbursed by the Contracting Authority (as applicable / non-exhaustive list)
<ul style="list-style-type: none"> • Archaeology Services & Reporting • Building Conservation Report • Arborist Services • Acoustic Consultant Services • Asbestos Specialist Services • Building Surveys (measurement and condition) of existing buildings • Landscaping Visual Impacts Assessment & Graphics (incl. verified views and CGIS) • Wind Modelling & Report • Environmental Assessments and Monitoring (to incl. Mammal Expert, Ornithologist, Ecologist) • Initial biodiversity & Ecological Surveys (e.g. Bat & Bird Surveys, Mammals, Invasive Plant Survey) • Air Quality & Climate Modelling & Monitoring • Background Noise Survey • Sunlight & Daylight Modelling - Impact Studies & Report • Construction & Demolition Waste Management Plan • Operational Waste Management Strategies • GPR Survey • Drainage Records • Water Supply Records • Flood Risk Assessment • Road Safety Audit • Photomontages • Creche report • Schools capacity report (if required) • Information Manager & BIM Coordination Services <ul style="list-style-type: none"> • Building Energy Modelling • Facade Specialist 	<ul style="list-style-type: none"> • Archaeology Testing • Test Trenching & Excavation Monitoring • Topographical Surveys • Biodiversity & Ecological Surveys (e.g. Bat & Bird Surveys, Mammals, Invasive Plant Survey), subsequent to initial biodiversity & ecological surveys • Ground / Geotechnical Investigations • Utilities Survey • Soil Infiltration Tests • Noise, Dust & Vibration Modelling & Monitoring • Tree Survey & Report • CCTV Survey • Pressure Testing Watermains • Waste Acceptance Criteria Assessment • Traffic Counts • Contaminated Land & Remediation Specialist • Intrusive surveys • Protected Structure fabric sampling and analysis • Asbestos Survey • Planning Application Website • Ecological monitoring services, including Ecological Clerk of Works. • Purchase of BIM 360 licences

The design team shall advise at the earliest possible stage of any other surveys that may be required for the project and shall scope and procure such surveys in consultation with the client. Such surveys could include the digging of slit trenches, camera surveys etc. It will be the responsibility of the team to source and coordinate these surveys.

1.7 Project Stages

The ALDT will be required to provide all required professional services for Stages (1a) and (1b) up to the issue of the Planning Application, and in the event of services required post lodgement of the planning application, Stages (2) through to (5) of the Conditions of Engagement, in summary:

- Stage 1(a): Feasibility, Urban Design / Masterplan, and Outline Design Stage (*up to CA approval of the Feasibility Report*)
- Stage 1(b): Preliminary Design and Planning Application Stage (*up to submission of the valid planning application(s) and if required response to a Further Information request - additional planning services post lodgement of application will be negotiated (possibly a lump sum) based on tenderers' hourly rates*)
- Stage (2): Detailed Design and submission of valid Statutory applications (*up to issue of the full tender package; to include input to the main contractor pre-qualification process and development of the tender documents*)
- Stage (3): Tender Action, Evaluation and Award (*from issue of the full tender documents to contract award*)
- Stage (4): Construction Stage (*up to Practical Completion of the final phase*)
- Stage (5): Handover Period (*up to fully operational facilities including the completion of all snagging works*)

Further details in relation to the required Consultancy Scope of Services for Stages (1) through to (5) is provided in this document.

The Project Stages may be subject to overlap depending on the circumstances and main contractor procurement and contracting strategy of any Call-Off Contract.

General services are required by all ALDT members for all stages and these include:

- Such services as are reasonable and incidental to the specific services identified below in relation to each element of the design stage
- Such services as are reasonable and required to complete each element of the design such that the Project can be completed in accordance with the Project Brief.
- as a reasonable professional consultant would contemplate or infer as being required as part of each element of the services.
- Printing (and digital copy) costs associated with submitting planning and other statutory applications
- Maintenance of the project risk register.
- Attendance and presentation at project meetings, including:
 - CA meetings
 - Stakeholder meetings
 - Local Authority / Pre-planning / Utility provider consultation meetings
 - ALDT design meetings and workshops
 - Risk workshops
 - Site meetings
 - End of stage project review meetings
 - Lessons learned sessions
- A formal design team report is required on completion of each stage for client approval.

2 Stage 1a – Feasibility, Urban Design / Masterplan & Outline Design Stage

2.1 Architectural Services and Architectural Services – Masterplan and Urban Designer

- Act as the DTL.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief including Sketch Proposals and Cost Analysis to achieve brief in advance of design
- Update and re-issue written project brief
- In consultation with the ALDT, assist the CA's appointed representative(s) to produce a Detailed Project Programme upon appointment setting out how the Project will be delivered within the required time period or by the required delivery date, and maintain this programme throughout the project lifecycle;
- Concept development.
- All liaison with the Masterplan and Urban Designer Architect and production of solutions for the best fit approach to sustainable development and vision while being sensitive to the surrounding environment.
- Assessment of risks in context of urban design and proactively lead on workshops with the ALDT as necessary to assess the mitigation measures to be implemented and progress the implementation of these mitigation measures.
- Advise the CA on any potential considerations with regard to third party engagement (i.e. boundaries, access, wayleaves, etc.) which may exist requiring legal attention.
- Investigate all possible grant schemes/funding support available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
- Make applications for the grant schemes/funding support where relevant on behalf of the CA and administer the applications as so necessary.
- Liaise with the CA / CA's Property Advisors / CA's appointed representative(s) as required to progress site feasibility studies and masterplans.
- In consultation with the CA's professional advisers and project stakeholders to develop the feasibility and possible capacity of the site for the proposed scheme undertake the following:
 - Present a project process plan for the feasibility stage for discussion and approval by the CA.
 - Collect and analyse baseline information.
 - Carry out urban design, landscape, and ecological analysis.
 - Develop a series of design and site layouts options.
 - Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
 - Feasibility testing and development of site capacities.
 - Develop design iterations, construction approaches and cost implications to achieve an environmentally & economically optimised design which fulfills the criteria of the client brief & LAP and incorporating the scope of services at 1.4.2 (i) sustainability specialist(s)
 - Ensure alignment with CA Strategies.
 - Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
 - Lead, proactively engage and manage the ALDT to review new technologies, innovative design, and methods of construction, obtaining working knowledge of Green

and Smart Technologies etc. to achieve best practice design and construction solutions where relevant to the proposed project. Such engagement to include workshops and reporting if required to feed into sustainable and economic feasibility recommendations for the development.

- Input relevant observations and findings into later phasing/design evolutions.
- Master planning, feasibility studies, condition surveys and funding proposal documentation support.
- Condition report preparation.
- Sustainability report preparation – to include overview of the coordination of inputs and advice from the Design Team & review of design options and associated impacts on costs and building performance.
- Survey existing buildings / structures on site to ascertain condition, dimensions, levels etc. or any required information to progress the design (including external survey for landscape design), following which determine scope of works, advise CA on any implications of works and report for CA review/agreement;
- Implement surveys of existing facilities, measured building surveys and prepare all relevant drawings of the existing building and associated infrastructure.
- Review current Statutory Consents, Local Authority area development plans and Authority masterplans in place in relation to the development site(s) to ensure proposals comply and amend/advise as required.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into relevant documentation.
- Advise the CA and the ALDT of all duties and responsibilities arising from the existing, planned and anticipated statutory regulations.
- Consultation on the acquisition of Statutory Approvals including Planning submission, Fire Safety Certification, Disability Access Certification, commuting, landscape, infrastructure, and other development related matters.
- Implement as required meetings with ALDT to gather all information necessary to begin the design process.
- Review outline designs to ensure compliance with obligations and Building Regulations.
- Develop schedule of works necessary to advance the initial phase of the works if required when agreed with the CA in advance - example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main Contractors. The Architect is to carry out the role of Employers Representative for the works.
- If agreed with the CA, develop a scope of works including drawing and specifications for any specialist area of work required to be procured in advance of the main contract to de-risk the site in advance of main contractor tender pricing and to expedite the works beginning onsite in a prompt manner to allow the main Contractor(s) complete the works within the required timescale.
- Provide weekly short form progress reports to CA & the CA's appointed consultants (as relevant) and monthly reports (presented at monthly CA meeting attended by all ALDT members) during this phase.
- Agree the change procedure with the CA and manage / report on same.
- Coordinate CA interface on a continual basis.
- Compile Stage 1a report coordinated with input from all ALDT consultants and obtain CA Approval.

2.2 Mechanical & Electrical Services

- Liaise with DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Liaise with the various ALDT consultants to inform the masterplan and sustainable urban design process and seek & provide relevant information as required to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL to contribute to a coordinated Detailed Project Programme as required.
- Liaise with DTL to review CA procedures and design standards to ensure adherence.
- Liaise with the DTL and ALDT Members to coordinate design elements.
- Carry-out utility availability desk-top studies.
- Survey and report on existing installation conditions and issue recommendations
- Investigate all possible grant schemes available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
- Make applications for the grant schemes on behalf of the CA and administer the applications as so necessary.
- Advise on technical guidelines, including NZEB compliance and other Industry wide energy efficiency standards e.g. Well Building Standard, Passive House, HPI etc as required
- Master-planning, feasibility studies, condition surveys and funding proposal documentation support.
- Condition and sustainability report preparation.
- Attend site visits to review existing facilities identified for refurbishment / adaptive re-use as agreed with the CA.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme including the following:
 - Assist with formulation of a project process plan for the feasibility stage and present to the CA for discussion and approval.
 - Collect and analyse baseline information.
 - Assist with urban design analysis and attend workshops, as necessary.
 - Assist with development of a series of design and site layouts options
 - Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
 - Feasibility testing and development of site capacities.
 - Review alternative design and construction approaches and cost implications
 - Ensure alignment with CA Strategies.
 - Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
 - Support the Architect, and other ALDT members, with feasibility strategies for the Project including attendance and participation in workshops, reporting and recommendations.
- Develop outline Electricity, Gas, Water, communication infrastructure in line with the CAs requirements

- Provide cost valuation support to ALDT and value engineering activities
- Advise on cost implications of various options and any alternative design as required.
- Develop a schedule and if necessary, a BOQ for works necessary to advance the initial phase of the works - example: strip out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- Advise on tendering procedures
- Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Input into Stage 1a report, as necessary.

2.3 Quantity Surveyor Services

- Liaise with the CA and appointed consultant team to determine the CA's initial requirements and input into the development of the project brief.
- Review and comment on the preliminary budget approval for the project with respect to the project brief.
- Undertake a site visit (to each site if more than 1no.) and review all existing information, including existing site surveys, draft masterplans, reports, health and safety risk assessment(s):
 - Identify any information gaps that may exist and advise on the commercial impact of same.
 - Advise on additional surveys that may be required and procure surveys on behalf of the CA.

Prior approval for all additional work is to be provided by the CA.
- Prepare commercial reports and cost plans as required for presentation to LDA departments / other stakeholders.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.
- Advise on potential procurement options and feasibility of the various options.
- Provide a high-level overview of the commercial constraints within which the ADLT must work and prepare an initial budget estimate from feasibility studies.
- Participate in project meetings including design team meetings to ensure the design progresses in accordance with the budget.
- Participate in and provide cost advice for optioneering exercises.
- Manage, control and monitor M&E cost and prepare cost estimates, liaising with the Mechanical and Electrical (M&E) Sub Consultant to ensure that cost estimates for M&E are appropriate and reflective of the design intent and brief.
- Prepare overall project cost calculation and cash flow projections.
- Prepare the overall project Development Budget, complete with detailed cash flow in the standard LDA Development Budget template. To be carried out in conjunction with the Project Manager. Obtaining information from the Team as required with respect to soft costs and cash flow.
- Produce a detailed benchmark cost analysis of schemes of a similar nature for consideration by the LDA.
- Summarize Cost Estimates in the LDA standardized Cost Headings and to populate standardized LDA Typology Template.
- Produce Key Building Design Metrics document & tracker which will ensure optimum value for money and efficiencies in the design Present to the Design Team and track inclusion of metrics in the evolving design.

- Where BIM is being utilized on the project liaise with the Design Team in terms of information required within the model to aid quantification and quantity extraction in an efficient manner. Assisting in the production of the Employers Information Requirements and BIM Execution Plan, setting out clearly the information the QS requires to be included in the model(s) at each Stage of the project
- Provide information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.
- Prepare a commercial report for inclusion in the Stage 1a Design Report to be issued by the consultant team on completion of the stage. This is to include potential procurement options and associated risks and opportunities for client consideration.

2.4 Civil & Structural Engineering Services

- Liaise with the DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL, contribute to a coordinated Detailed Project Programme as required.
- Liaise with the DTL and ALDT Members to coordinate design elements.
- Carry-out site condition and ground contamination desk-top studies.
- Coordinate and Prepare as required Flood Risk Assessment, Engineering Services Report, Mobility Management Plan, Traffic & Transportation Assessment, Construction & Environmental Management Plan.
- Surveys – progress any required surveys required to progress design including survey & report on existing structure & infrastructure
- Attend site visits to review existing facilities identified for refurbishment / adaptive re-use as agreed with the CA.
- Investigate all possible grant schemes available to the CA in relation to the refurbishment / adaptive re-use of existing premises for retention and make recommendations to the CA.
- Make applications for the grant schemes on behalf of the CA and administer the applications as so necessary.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme including the following:
 - Assist with formulation of a project process plan for the feasibility stage and present to the CA for discussion and approval.
 - Collect and analyse baseline information.
 - Assist with urban design analysis and attend workshops, as necessary.
 - Assist with development of a series of design and site layouts options with particular reference to the potential for integration of green infrastructure & coordination with Urban Designer, Landscape Architect & Ecologist.

- Incorporate, in both the brief and design, any relevant comments provided by the stakeholders.
- Feasibility testing and development of site capacities.
- Review alternative design and construction approaches and cost implications
- Ensure alignment with CA Strategies.
- Incorporate findings from consultation, engagement, surveys, and investigations into the masterplans, as appropriate.
- Support the Architect, and other ALDT members, with feasibility strategies for the Project including attendance and participation in workshops, reporting and recommendations
- Liaise with DTL to review CA procedures and design standards to ensure adherence.
- Develop outline structural infrastructure and building opening requirements
- Audit existing infrastructure, potential strengthening, and replacement requirements
- Master-planning, feasibility studies, condition surveys and funding proposal documentation support.
- Condition and sustainability report preparation.
- Generate options to meet outline requirements
- Develop outline design drawings and issue to the ALDT in a timely manner
- Prepare cost estimates for the structural services and issue to Quantity Surveyor & DTL.
- Draft a strategy for structural infrastructure
- Advice on compliance with Building Regulations / other statutory requirements
- Report on existing installations
- Develop schedule of works as necessary to advance the initial phase of the works - example: strip out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Input into Stage 1a report, as necessary.

2.5 Landscape Architectural Services

- Contribute to the development and preparation of Project Brief in consultation with the DTL.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process. Include coordination with Ecologist, Urban Designer and Structural & Civil Engineer to explore integration of green infrastructure in to Landscape design.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Liaise with the DTL, contribute to a coordinated Detailed Project Programme as required.
- Contribute to the development of best practice design & construction solutions for successful delivery of affordable permanent occupancy residential units.
- Contribute to the examination and preparation of alternative design solutions, adjustments and design revisions as required to meet the Project brief and budget.
- Assist with urban design analysis and attend workshops, as necessary.

- Contribute to the preparation of a full and complete statement of the CA's functional, aesthetic, and operational requirements for the Project.
 - Advise and assist the DTL / Quantity Surveyor in developing the Project Budget.
- Contribute to preliminary cost estimates and Outline Cost Plan for the project and assessment against the agreed budget.
- Carry out design review with reference to functionality, efficiency, sustainability, commercial liability, economy, whole life costs and suitability for financing, sale, or lease, as may be required.
- Site appraisal and report – Carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- Advise the DTL on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA's requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Contribute to the Scheme Design and general design Specification in accordance with the Project Brief.
 - Comply with design production programmes set by the DTL.
 - Contribute to pre-planning and any other necessary statutory or regulatory consultation as required.
 - Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
 - Contribute to site investigation process, site surveys and tests, examination of availability of public utilities and associated reports.
 - Input into Stage 1a report, as necessary.

2.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended, notwithstanding any inconsistent Contract contents.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Confirm compliance with PSDP duties in respect of this stage.
- Liaise with the DTL and members of the ALDT to ascertain a full understanding of design risk assessments and provide advice as required.
- Assist in preparation of Stage report for CA review.

- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Site visits as required during this stage.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Provide Health and Safety expertise and input at all stages of the Preliminary design phase of the project
- Compile design risk assessments as required.
- Input into Stage 1a report, as necessary.

2.7 Planning and Environmental Consultancy Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Advise on the appropriate planning strategy for the site taking account of the various elements of works proposed. Manage and coordinate the strategic planning advice and all associated planning documentation required during the feasibility stage of the project.
- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek to provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend workshops as necessary to input into the urban design analysis.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme immediately on appointment setting out how the Project will be delivered within the required time period or by the required delivery date specifically in relation to planning / environmental programme constraints.
- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.
- Advise the DTL on potential project risks.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports. Ensure that timeframe for commissioning of surveys and reports is highlighted at the earliest stage of the project to ensure all wildlife surveys are carried out at appropriate times. At a minimum, a baseline ecological survey should be carried out to include recommendations for biodiversity enhancement measures and potential for biodiversity corridors & links to wider area . Planning Consultant will ensure dissemination and coordination of these reports and recommendations with the landscape architect, urban designer & civil engineering consultants for integration in to masterplan proposals as appropriate.
- Advise the DTL in relation to advance works requirements where applicable.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.

- Provide a comprehensive Town Planning Evaluation Report to the Design Team which sets out the basic planning principles and parameters within which the design will evolve, and the final design should be structured.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Assist with development of a series of design and site layouts options.
- Appropriate Assessment Report.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Advise on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA's requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Review and advise upon the planning history of the subject site, relevant adjacent sites, and the strategic and statutory planning context. Comment on the project brief and design proposals in the context of the planning constraints and opportunities.
- Assist in preparation of Stage 1a report for CA review

2.8 Traffic & Transport Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend workshops as necessary to assist with urban design analysis.
- Prepare and assist ALDT with formulation of Mobility Management Plans, Traffic & Transportation Assessments, Construction & Environmental Management Plans.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in their occupancy.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports.
- Carry-out (appoint and administer) required surveys and market research as is necessary.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme.
- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.

- Advise the DTL on potential project risks.
- Advise the DTL in relation to advance works requirements where applicable.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.
- Assist with development of a series of design and site layouts options
- Advise on work breakdown structure and procurement strategy for the Project, having due regard to the Project Brief, the capabilities of the CA organisation, characteristics of the Project (urgency, complexity, size), market conditions and the CA's requirements on risk allocation.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Assist in preparation of Stage 1a report for CA review

2.9 Archaeology Consultancy Services

- Contribute to the development and preparation of Project Brief in consultation with the CA, ALDT and key stakeholders.
- Liaise with the various ALDT consultants to inform the masterplan and urban design process and seek & provide relevant information to inform the decision-making process.
- Assist the Masterplan and Urban Design Architect in the delivery of their scope of services during this stage.
- Attend a series of works shop meetings with ALDT to gather all information necessary to begin the design process.
- Conduct an archaeological desktop study to advise on the archaeological characteristics of the site and associated mitigation measures.
- Obtain all necessary information and documentation relevant to the project for the performance of this stage of the Service from the CA and DTL and any other relevant sources.
- Advise the DTL on the necessity for studies, reviews, investigations, surveys, tests or the like and coordinate the implementation of these and associated reports.
- Advise the DTL in relation to advance works requirements where applicable.
- Carry-out (appoint and administer) required surveys and research as is necessary.
- Site appraisal and report – carry out feasibility studies and prepare all necessary drawings for site appraisal showing all relevant information both existing and proposed new works.
- In consultation with the DTL, contribute to the preparation of a draft Detailed Project Programme
- Advise and assist the DTL in developing the Project Budget.
- Contribute to preliminary cost estimate and outline cost plan for the project and assessment against the agreed budget.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Assist the DTL and participate with consultations to the CA's professional advisers and project stakeholders (along other ALDT members) to develop the feasibility and possible capacity of the site for the proposed scheme.

- Assist in preparation of Stage 1a report for CA review

3 Stage 1b – Preliminary Design and Planning Application Stage

3.1 Architectural Services

- Act as DTL.
- Lead the ALDT consultants' input to updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Utilise appropriate sustainable and environmental design concepts as agreed with the CA.
- Prepare a sustainability report for the development.
- Prepare detailed masterplan for the site(s).
- Liaise with designers to review design progress and to advise to ensure compliance with regulations and obligations.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement.
- Confirm the results of surveys have been considered in the outline design and Planning Application.
- Develop design and construction approaches to achieve an environmentally & economically optimised design which fulfills the criteria of the client brief & LAP and incorporating the scope of services at 1.4.2 (i) sustainability specialist(s)
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into outline design drawings and Planning Application.
- Provide planning consultancy and advice throughout the design phase as required.
- In consultation with the ALDT, prepare and collate necessary reports required for Planning Applications.
- Provide information for the preparations of a project cost plan.
- Monitor and Report on Design plans & timelines for participation by ALDT members, CA, and other relevant parties.
- Provide all imagery (3D images and graphics) for Planning Application.
- Provide all necessary preliminary certifications at this point (e.g., Well)
- Provide fortnightly progress reports to CA during this phase
- Ensure the planning application is feasible from a fire safety and disability access design perspective, as necessary.
- Stage 1b progress report to CA prior to issue Planning Application with input from all ALDT consultants and obtain CA Approval:

3.2 Architectural Services – Masterplan and Urban Designer

- Liaise with DTL and CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Consult with the ALDT consultants to update / develop proposals throughout this stage to further address the scope of services identified at Stage 1a taking on board, where relevant, engagements with Stakeholders.
- Prepare a design master plan for the development, to include new housing, new open spaces and new community facilities; provide such drawings, 3-D models and views and reports as required to describe the plan; and participate in public display and presentations to the relevant stakeholders.

- Advise on the development and interaction with community facilities (including local retail and leisure etc.).
- Update recommendations, if required, for working with the proposed mix and distribution of tenures on the lands to create a sustainable model going forward.
- Assist and input into the preparation of Planning Application during this stage.
- Advise the CA / lead Architect on any potential considerations with regards third party engagement (i.e. boundaries, access, wayleaves, etc.).
- Carry out required modelling and analysis as necessary for Planning Application.
- Liaise with the project team to update risk assessments in context of masterplan and urban design and attend workshops with the ALDT as necessary to assess and implement mitigation measures.
- Input into the Stage 2b report.

3.3 Mechanical & Electrical Engineering Services

- Continue engagements with utilities providers where necessary to determine existing services to/from the site.
- Identify Electrical, Gas, Water, communications infrastructure, Supply availability, costs etc. and arrange any specialist surveys on services to be carried out – e.g. Vibration isolation, etc.
- Prepare and submit necessary enquiries and applications to utility providers. Advise DTL and CA of any implications. Liaise with Quantity Surveyor to ensure any abnormal costs are reflected in the cost plan.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Build in future flexibility as a critical design factor
- Life cycle cost assessments where appropriate such as heating, energy performance, sustainability, etc.
- Planning and negotiating with supply authorities in connection with the provision and installation of supplies, as necessary.
- Prepare business case studies for alternative options for energy distribution within the development, e.g., centralised versus decentralised systems.
- Prepare all coordinated outline design drawings and documentation for Planning Application
- Provide all required information to the Quantity Surveyor, as necessary.
- Prepare site plans and input into detailed coordinated masterplan for Planning Application.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement
- Confirm the results of surveys have been considered in the Outline design and Planning documents.
- Liaise with adjacent landowners, as necessary.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare BER(s) as required.
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Input as required into Stage 1b reports to the CA.

- Carry out required modelling and analysis as necessary for Planning Application
- Provide all necessary preliminary certifications at this point (e.g., BER)
- Assist the DTL in ensuring the planning application is feasible from a fire safety and disability access perspective, as necessary.
- Demonstrate compliance with Building Regulations / other statutory requirements.

3.4 Quantity Surveyor Services

- Carry out a cost review of the preliminary design. Make recommendations on alternative preliminary design and construction options in respect of costs, including but not limited to appropriateness of construction, economy of construction per building element/key materials and key items to be included in the output specifications.
 - Advise on cost of design team proposals, including effects of site usage, shape of buildings, alternative forms of design and construction as design develops.
 - Assess options for building services design with the M&E sub consultant and advise on costs and life-cycle costing as appropriate.
 - Participate in and provide cost advice for optioneering exercises.
- Prepare an Outline Cost Plan to include all project costs (e.g. Capex cost, FM Services cost and Lifecycle cost if applicable) and prepare associated cash flow forecasts for issue to the Client. This shall present costs at a high level on a site by site basis and aggregate basis (format to be agreed with the Client) and shall show the appropriate VAT rate.
- Prepare the overall project Development Budget, complete with detailed cash flow in the standard LDA Development Budget template. To be carried out in conjunction with the Project Manager. Obtaining information from the Team as required with respect to soft costs and cash flow.
- Produce a detailed benchmark cost analysis of schemes of a similar nature for consideration by the LDA.
- Summarize Cost Estimates in the LDA standardized Cost Headings and to populate standardized LDA Typology Template.
- If requested produce the Outline Cost Plan in accordance with the new International Construction Measurement Standards.
- Manage and prepare M&E cost estimates, liaising with the Mechanical and Electrical (M&E) Sub Consultant to ensure that cost estimates for M&E are appropriate and reflective of the design intent and brief. Prepare, in conjunction with the M&E consultant M&E cost options analysis including cost in use and life cycle costing of systems.
- Produce Key Building Design Metrics document & tracker which will ensure optimum value for money and efficiencies in the design. Present to the Design Team and track inclusion of metrics in the evolving design.
- Where BIM is being utilized on the project liaise with the Design Team in terms of information required within the model to aid quantification and quantity extraction in an efficient manner. Assisting in the production of the Employers Information Requirements and BIM Execution Plan, setting out clearly the information the QS requires to be included in the model(s) at each Stage of the project.
- Provide information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.
- Attend Preliminary Design meeting(s) with the Client to review the preliminary design, planning application and project costings.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.

- Prepare a commercial report for inclusion in the Stage 1b Design Report to be issued by the consultant team on completion of the stage including the recommended procurement strategy.

3.5 Civil & Structural Engineering Services

- Consider relevant reports, data, and information available and arrange surveys of the site as required including a survey of the existing foul and surface water drainage system (at the CA cost).
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Liaise with the CA representative and make sure those relevant and appropriate factors from the end-user's specialist functions are incorporated into the designs
- Build in future flexibility as a critical design factor
- Assess existing structure and site surveys and complete additional surveys as required e.g. vibration, isolation etc.
- Generate relevant data and reports for the ALDT, and review this data against scheme design and report any anomalies to the DTL / CA.
- Prepare detailed masterplan for the site.
- Liaise with adjacent landowners, as necessary.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Advice on compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the outline design and Planning Application.

Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;

- Prepare Construction Management Plan as required by planning application
- Prepare Planning Permission application submission, including reporting and other related services associated with the site.
- Input as required into Stage 1b reports to the CA

3.6 Landscape Architectural Services

- Prepare detailed masterplan for the site.
- Prepare outline sketch design incorporating landscaping layout, accompanied by sections and elevations indicating the general character and massing of the planting. A number of options may need for approval prior to Planning Application.
- Provide all necessary Landscaping Services cost advice to the DTL / Quantity Surveyor.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Revise as necessary the Landscaping documentation as required to meet the Project Brief and Budget following consultation with the ALDT / CA in advance of Planning Application.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the outline design and planning application.
- Support the Architect, and other ALDT members as necessary in the utilisation of best practice construction methods & construction solutions where relevant, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents;
- Prepare Planning Permission application submission documentation and drawings.
- Assist in the planning application, ensure compliance with the planning context to include all associated technical reports as required.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Comply with design production programmes by the ALDT to meet the agreed Programme.
- Attend to consultation and liaison with adjoining owners or interests, as required.
- Input as required into Stage 1b reports to the CA

3.7 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended, notwithstanding any inconsistent Contract contents.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Provide Health and Safety expertise and input at all stages of the design phase of the project
- Compile all necessary design risk assessments.
- Input as required into Stage 1b reports to the CA

3.8 Planning and Environmental Consultancy Services

- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders as required.
- Liaise with the ALDT to input with updating / developing proposals for the site masterplan & urban design throughout this stage and assist the Masterplan and Urban Design Architect with their scope of services.
- Contribute to a project specific sustainability and energy use strategy and satisfies the CAs requirements in a cost-effective manner.
- Collaborate with the ALDT in formulating recommended design solutions for CA approval and subsequent development.
- Contribute to site investigation process, site surveys and tests, examination of availability of public utilities and associated reports.
- Prepare preliminary Environmental Consultancy Services drawings and report. A number of options may need to be examined to satisfy the CA needs, Cost Limits and Planning requirements.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
 - Prepare any documents needed for the planning application which are not specifically identified as being prepared by others including but not limited to any planning policy statement or statement of community involvement if required for the application.
- Appropriate Assessment Screening and if required Natura Impact Statement.
- Ecological Impact Assessment.
- Environmental Impact Assessment Screening for the site, in co-operation with the other ALDT members, a full Environmental Impact Assessment Report (to include all associated surveys and reports).
- Prepare design for Environmental elements.
- Revise as necessary the Environmental Services documentation following a review with the DTL and the CA and submit revisions for approval.
- Coordinate the planning application, ensure compliance with the planning context to include all associated technical reports as required.
- Review drawings and planning application information pre-lodgement to ensure the package is appropriate for the application, from a planning perspective.
- Co-ordinate and lodge planning application including preparation of statutory notices, application form, application fee calculation and planning report.
- Issue a Schedule of Documents for the planning application detailing the specific documents required for the application and associated responsible party.
- Assist DTL in the preparation of a detailed coordinated design programme for this stage.
- Assist in preparation of Stage 1b reports for CA review.
 - Lessons learned sessions
- Ensure all documents formally submitted to Local Authorities are saved to project document management system.

3.9 Traffic & Transport Services

- Advise in relation possible grant schemes available to the CA in relation to the project.
- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in occupancy.
- Prepare preliminary Traffic & Transport Services drawings and report. A number of options may need to be examined to satisfy the CA needs, Cost Limits and Planning requirements (including further Fire Safety and Disability Access requirements).
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Prepare road safety audits as required for the planning application.
- Input into Construction Management Plan as required by planning application
- Provision information to the DTL / Quantity Surveyor, as necessary.
- Assist in preparation of Stage 1b reports for CA review

3.10 Archaeology Consultancy Services

- Contribute to pre-planning, fire safety and any other necessary statutory or regulatory consultations as required.
- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
- Prepare preliminary Archaeology Consultancy Services drawings and report for Planning Application.
- Prepare developed sketch / outline design for Archaeological elements.
- Provide information to the Quantity Surveyor and other Consultants to enable quantification for preparation of cost estimates and Cost Plan.
- Liaise with statutory bodies, as necessary.
- Contribute to the planning application, as necessary.
- Assist in preparation of Stage 1b reports for CA review

4 Stage 2 – Detailed Design and Statutory Approvals

4.1 Architectural Services

- Act as DTL.
- Coordinate the compliance responses to planning conditions once received. Prioritise the “prior to commencement” planning conditions.
- Directly prepare the response to individual planning conditions.
- After reviewing the existing CA data and consulting fully with the CA, complete detailed interior design & finalized space planning layouts.
- Develop detailed design drawings and specifications for tender.
- Utilise appropriate sustainable and environmental design concepts as agreed with the CA.
- Liaise with designers to review design progress and to advise to ensure compliance with regulations and obligations.
- Develop design programme; consider construction and procurement phasing; input into the contracting and procurement strategy.
- Prepare detailed cash flow for the period up to start of construction to include all ALDT fees and associated survey costs.
- Liaise as necessary with adjacent landowners, development partners to obtain all approvals
- Advise on, procure, and administer all necessary site surveys to support the detailed design.
- Oversee the application for all statutory licenses including archaeological, ecological, contamination, asbestos and oversee the associated mitigations.
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement.
- Detail and specify fully all elements, including compliance with the requirements of the Building Control (Amendment) Regulations 2014 and the Code of Practice for Inspection and Certifying Building and Works.
- Confirm the results of surveys have been considered in the detailed design.
- Develop design iterations, construction approaches and cost implications to achieve an environmentally & economically optimised design which fulfills the criteria of the client brief & LAP and incorporating the scope of services at 1.4.2 (i) sustainability specialist(s)
- Advise the CA and ALDT of all obligations relating best practice design & construction solutions for successful delivery of affordable permanent occupancy residential units during this stage.
- Prepare and lodge Fire Safety Certification application, Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into detailed design, Statutory Approvals Applications, and tender documentation.
- Preparation of conservation documentation as required and incorporate input from Conservation Architect into outline design drawings and Planning Application.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, prepare, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare Additional / Further Information responses, Planning Compliance submission(s) and submit to authorities if required.

- Provide planning consultancy and advice throughout the design phase as required.
- Advise the CA and ALDT of all duties and responsibilities arising from existing planned and anticipated statutory regulations.
- Provide Daylight and Sunlight Analysis.
- Provide information for the preparations of a project cost plan.
- Develop schedule of works necessary, if required, to advance the initial phase of the works- example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
- If agreed in advance with the CA, Develop a scope of works including drawing and specifications for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor complete the works within the required timescale.
- Coordinate the work of all ALDT members in drawing up production information for tender documentation to provide a fully documented proposal for the tender evaluation phase.
- Arrange sample finishes presentation for CA sign off
- Prepare and agree with the CA a procurement strategy for the projects – 2 stage restricted procedures (OJEU) to be assumed.
- Produce comprehensive Works Requirements documents including performance specifications with input from the ALDT members.
- Coordinate a structured set of tender documents with all coordinated detailed design drawings and specifications for the works from the ALDT.
- Prepare Preliminary Inspection Plan (PIP) in consultation with the ALDT members in compliance with the Building Control (Amendment) Regulations 2014 and the Code of Practice for Inspection and Certifying Building and Works.
- Oversee the formulation of all tender documents, including Suitability Assessment Questionnaires (SAQ), Requests / Invitations to Tenderers, evaluation criteria, Forms of Tender and associated information documents with input from the ALDT and CA as required, and ensure fully documented proposal for shortlisting (SAQ), tendering and subsequent tender evaluation;
- Input as necessary into main contractor pre-qualification process.
- Advise, procure, and oversee any required enabling works.
- Provide imagery for project promotional material – provision of 3D images and graphics.
- Provide appropriate detail drawings; 1:10; 1:25; 1:50 for proper detailing and analysis
- Provide all necessary detailed certifications at this point (e.g., Well)
- Provide fortnightly progress reports to CA during this phase
- Prepare Stage 2 Report including pre-tender cost plan – present to CA towards the end of stage

4.2 Quantity Surveyor Services

- Prepare a Detailed Cost Plan (format to be agreed with the Client) with reference to the Preliminary Design and all project costs applying a top-down and bottom-up estimating approach. The Detailed Cost Plan is to include the following:
 - Capex costs including, main works (including M&E and ICT), fittings and equipment, external works, off-site works, abnormalities, works in connection with Statutory Consents and risk costs
 - Opex costs including operating, maintenance (soft and hard)
 - Lifecycle costs, where required

- Enabling/advance works costs (if any)
- Inflation indices and VAT figure(s)
- Unit rates used are to be substantiated with reference to relevant building rates, benchmark costs/projects, market rates/prices and any other key items and shall be measured, priced, and itemised on an elemental basis. Cost for items, such as furniture, fittings, and equipment (FF&E) (prepared with reference to a detailed matrix) and FM Services shall be itemised and demonstrated with reference to market rates.
- Insurance reinstatement costs
- Cashflow forecasts in respect of the key cost headings and an assumptions report.
- A detailed cost model for each cost heading including:
 - Lifecycle costs (with reference to building element, frequency of replacement, costs etc.)
 - Facilities management costs with reference to service delivery model, staffing costs, contracted services costs etc.)
 - FF&E (itemised with reference to market prices) [potentially where LDA retains ownership in a “Cost Rental” model].
- Prepare the overall project Development Budget, complete with detailed cash flow in the standard LDA Development Budget template. To be carried out in conjunction with the Project Manager. Obtaining information from the Team as required with respect to soft costs and cash flow.
- Produce a detailed benchmark cost analysis of schemes of a similar nature for consideration by the LDA.
- Summarize Cost Plans and Pre-tender Estimate in the LDA standardized Cost Headings, across respective tenures, phases and sections and populate standardized LDA Typology Template.
- If requested produce the Cost Plan and Pre-tender estimate in accordance with the new International Construction Measurement Standards.
- Manage and prepare M&E cost estimates, liaising with the Mechanical and Electrical (M&E) Sub Consultant to ensure that cost estimates for M&E are appropriate and reflective of the design intent and brief. Prepare, in conjunction with the M&E consultant M&E cost options analysis including cost in use and life cycle costing of systems.
- Produce Key Building Design Metrics document & tracker which will ensure optimum value for money and efficiencies in the design. Present to the Design Team and track inclusion of metrics in the evolving design.
- Maintain and update cost plans to reflect any design changes during the detailed design process. Prepare periodic reports and updated cash flow forecasts as required.
- Provide commercial information for inclusion in the monthly project report to be prepared by the PM.
- Preparing such final calculations and details relating to the Works as may be required for submission for an independent check by others nominated by the CA.
- Prepare a pretender estimate for CA review prior to tender and advise on future anticipated inflation.
- Finalise the procurement strategy in consultation the PM and key design team members and seek approval of same from the LDA.
- Draft standard tender documents required under public procurement legislation such as Invitation to Tender, Prior Information Notices and liaise with the LDA to finalise and approve.
- Review detailed design and comment on commercial impact of final tender documents / drawings.
- Prepare Pricing Document in appropriate A.R.M. format and any additional procurement documents ready for tender action. This will include all relevant Procurement Documents required for tendering in accordance with Public Procurement Guidelines and all relevant legislation.

- The Mechanical and Electrical Sub Consultant to provide commentary on the QS M&E a pre-tender estimate.
- Detailed measured M&E schedules and quantities, in order to ensure that building service installations are incorporated into the detailed Bills of Quantities (BOQ) in accordance with ARM4, or the most recent publication at the time of the PTE, Supplement 2 or similar.
- Where BIM is being utilized on the project liaise with the Design Team in terms of information required within the model to aid quantification and quantity extraction in an efficient manner. Assisting in the production of the Employers Information Requirements and BIM Execution Plan, setting out clearly the information the QS requires to be included in the model(s) at each Stage of the project.
- Provide information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.

4.3 Mechanical & Electrical Engineering Services

- Identify Electrical, Gas, Water, communications infrastructure, Supply availability, costs etc. and arrange any specialist surveys on services to be carried out – e.g. Vibration isolation, etc.
- Apply for all utility connections and maintain a utilities tracker with reports issued to the DTL / CA as required.
- Liaise with the CA representative and make sure that relevant and appropriate requirements for the end user specialist functions are incorporated into the design.
- Build in future flexibility as a critical design factor
- Prepare pre-tender estimate for the building services and issue to quantity surveyor.
- Life cycle cost assessments where appropriate such as heating, energy performance, sustainability, etc.
- Planning and negotiating with supply authorities in connection with the provision and installation of supplies, as necessary.
- Prepare all coordinated detail design drawings and documentation for tender packs
- Prepare all coordinated design / tender drawings and specifications for the works in accordance with the relevant contracts.
- Produce comprehensive Works Requirements documents, all coordinated detailed design drawings and specifications for the works including performance specifications.
- Input to the completion of all tender documents, including Suitability Assessment Questionnaires, Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.
- Input into main contractor pre-qualification process.
- Complete detailed design of all mechanical building services
- Prepare and Complete the detailed design of all Electrical & information communication & technology building services
- Prepare detailed Mechanical & Electrical / Building Services design documents, drawings, and Specifications.
- Provide all required information to the Quantity Surveyor, including detailed measured M&E schedules, in order to ensure that building service installations are incorporated into the detailed Bills of Quantities (BOQ) in accordance with ARM4, or the most recent publication at the time of the PTE, Supplement 2 or similar.

- Provide commentary on the QS M&E a pre-tender estimate.
- Consider and determine the interface required between building services and the specialist equipment
- Demonstrate compliance with Building Regulations / Regulations / another statutory requirement
- Confirm the results of surveys have been considered in the detailed design.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare BER(s) as required.
- Ensure all building layout designs are fully coordinated with M&E design
- Ensure all external areas undergo an underground spatial coordination analysis for pipe and ducting runs including chambers and also surface chamber cover layout design is coordinated within the public realm
- In conjunction with other ALDT Members, prepare Fire Safety Certification application and Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Optimise and provide all anticipated energy consumption data to the DTL and CA.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare Additional / Further Information responses, planning compliance submissions and submit to authorities if required
 - Carry out all modelling, preparation, testing, imaging as necessary to meeting design brief and/or operational requirements of building
 - Demonstrate compliance with Building Regulations / other statutory requirements.
 - Develop a schedule and if necessary, a BOQ for works necessary to advance the initial phase of the works - example: strip-out of existing buildings, isolation of existing utilities and minor demolition contract to facilitate the speedy commencement of works by the main contractor.
 - Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Provide all necessary detailed certifications at this point (e.g., BER)
- Input as required into Stage 2 reports to the CA.

4.4 Civil & Structural Engineering Services

- Consider relevant reports, data, and information available and arrange surveys of the site as required including a survey of the existing foul and surface water drainage system (at the CA cost).
- Liaise with the CA representative and make sure those relevant and appropriate factors from the end-user's specialist functions are incorporated into the designs
- Build in future flexibility as a critical design factor
- Generate relevant data and reports for the ALDT, and review this data against scheme design and report any anomalies to the DTL / CA.
- Develop detailed design production documents, drawings, and specification from approved outlined proposals in a timely manner to allow the preparation of the tender documents, Bill of Quantities, and pretender cost estimate.
- Prepare detailed design and design calculations for the site.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Advice on compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the detailed design.
- Where relevant utilise best practice construction methods & construction solutions, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents, and support the Architect, and other ALDT members as necessary;
- Prepare Fire Safety Certification application, Disability Accessibility Certificate application, including reporting and other related services associated with the site.
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, prepare, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
- Prepare all coordinated design / tender drawings and specifications for the works in accordance with the relevant contracts.
- Produce comprehensive Works Requirements documents, all coordinated detailed design drawings and specifications for the works including performance specifications.
 - Input to the completion of all tender documents, including Suitability Assessment Questionnaires, Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.
- Input into the main contractor pre-qualification process.
- Develop schedule of works necessary, if required, to advance the initial phase of the works. Example: A isolation of existing utilities to facilitate the speedy commencement of works by the main contractor.
- Develop a schedule for any specialist area of work required to be procured in advance of the main contract to expedite the works beginning onsite in a prompt manner to allow the main contractor to complete the works within the required timescale.
- Ensure all external areas undergo an underground spatial coordination analysis for pipe and ducting runs including chambers and also surface chamber cover layout design is coordinated within the public realm
- Input as required into Stage 2 reports to the CA.

4.5 Landscape Architectural Services

- Prepare detailed masterplan for the site.
- Prepare outline sketch design incorporating landscaping layout to a scale of not less than 1:200 illustrating how it is proposed to provide the areas set out in the Project brief. The plans shall be accompanied by sections and elevations indicating the general character and massing of the planting. A number of options may need to be examined to satisfy the CA requirements, cost limits and planning, fire safety, disability access and health and safety requirements. The design must be reconciled with the brief requirements. Submit outline sketch design to CA.
- Participate with the ALDT and other consultants in value engineering and life cycle costing exercises.
- In consultation with the Quantity Surveyor provide all necessary Landscaping Services cost advice, investigation, and support to the ALDT including examination of alternative designs, adjustments, and revisions to meet the Project Brief and Budget. Prepare costings for landscaping design options or alternative designs as required.
- Arrange for a detailed review with the DTL of the Landscape drawings and specifications, and formally confirm that they have been prepared in accordance with the Project Brief and that they are consistent with architectural drawings.
- Demonstrate compliance with Building Regulations / other statutory requirements.
- Confirm the results of surveys have been considered in the detailed design.
- Support the Architect, and other ALDT members as necessary in the utilisation of best practice construction methods & construction solutions where relevant, such as new technologies, innovative design and methods of construction, obtaining working knowledge of Green and Smart Technologies etc. to feed into sustainable and economic feasibility recommendations for successful delivery of permanent residents;
- Prepare required drawings and documents for input with Fire Safety Certification & Disability Accessibility Certificate applications
- Assess notification and final grant of Planning Permissions and review with the ALDT.
- Take due account of, and respond appropriately to, the conditions of Planning permission requiring consultation with the Local Authority Fire Officer and any other officers or Local Authority Departments, as necessary.
 - Respond where required to Additional / Further Information requests, planning appeal process if applicable, and assessment and compliance with planning conditions (if required).
- Comply with design production programmes by the ALDT to meet the agreed Programme.
- Carry out whole life cost assessments as required in consultation with the Quantity Surveyor.
- Prepare detailed specification documentation for the works, including samples, testing, prototype, and QA procedures, with particular regard to sustainability, quality and standards required.
- Assist the DTL in the preparation of a report on the Detailed Design addressing all aspects of the developed design in an integrated manner in relation to the Project Brief, key stakeholder requirements, accommodation, and budget. Assist in a full design briefing to the CA.
- Conduct design review with reference to functionality, efficiency, sustainability, commercial viability, economy, whole life costs as may be required.
- Produce comprehensive works requirements documents, all coordinated detailed design drawings and specifications for the works.

- Input to the completion of all tender documents, including Suitability Assessment Questionnaires, Requests / Invitations to Tenderers, evaluation criteria, and associated information documents as required.
- Prepare and complete Works' Contract production information including detailed Specialists' design for tender documentation, tender drawings, specifications, and Forms of Tender to provide a fully documented proposal for tendering and subsequent tender evaluation.
- Input as required into Stage 2 reports to the CA

4.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, as amended.
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- Liaise with CA for the confirmation of the Project Brief and make sure that relevant and appropriate factors are incorporated into the Project brief.
- Provide Health and Safety expertise and input at all stages of the design phase of the project
- Compile design risk assessments from the relevant ALDT members.
- Issue a preliminary H&S plan to form part of the tender documentation.
- Assist in preparation of Stage 2 report for CA review.

4.7 Planning and Environmental Consultancy Services

- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders as required.
- Prepare and assist the ALDT with relevant reports to be issued for the purpose of planning permission.
- Prepare design for Environmental elements.
- Revise as necessary the Environmental Services documentation following a review with the DTL and the CA and submit revisions for approval.
- Review on an on-going basis the design to ensure that it is compatible with the requirements of the Planning Authority.
- Prepare Planning Compliance submission(s) and submit to authorities.
 - Provide the Client with a report on the conditions attached to any consent if required
 - Agree with the Client and other Consultants a programme for the submission of information to discharge the conditions.
 - Agree the discharge of conditions with the Local Authority.
- Advise on, prepare, and respond where required to Additional / Further Information requests, planning appeal process if required. Preparation of First party Appeal against (i) conditions or (ii) Refusal of Permission (if relevant) or First Party Response to Third Party Appeals (if relevant).
- Co-ordination of a unified response on all relevant planning conditions in the event of grant of planning permission issuing from the local authority which requires compliance and further negotiations with the local authority.
- Carry out whole life cost assessments as required in consultation with the Quantity Surveyor.
- Contribute to the risk management strategy and risk register.
- Assist DTL in the preparation of a detailed coordinated design programme for this stage.
- Advise on the need for any Specialists and associated cost factors.

- Coordinate the provision of necessary information to the DTL / Quantity Surveyor for the developed cost plan report.
- Advise upon, procure, and oversee all necessary surveys, on site measures & mitigations including statutory license applications. Provide timely advice on timelines to the DTL and CA.
- Produce comprehensive input to the works requirements documents, including all associated detailed design drawings and specifications for the works.
- Assist in preparation of Stage 2 reports for CA review

4.8 Traffic & Transport Services

- Review all site requirements in order to assess potential traffic and transport solutions to facilitate the site in occupancy.
- Advise on the need for any Specialists and associated cost factors.
- Advise on the need for any Specialist contractors and associated cost factors, carry out and/ or coordinate detailed design for Specialist works.
- Coordinate the provision of necessary information to the DTL / Quantity Surveyor for the developed cost plan report.
- Produce comprehensive input to the works requirements documents, including all associated detailed design drawings and specifications for the works.
- Contribute to cost plan and pre-tender cost estimate for the project and assessment against the agreed budget with DTL & the Quantity Surveyor.
- Contribute to project status review, design review, risk assessment, value management and cost check interventions, arrange associated workshops at appropriate intervals and initiate and monitor any consequential or remedial action necessary.
- Assist in preparation of Stage 2 reports for CA review

4.9 Archaeology Consultancy Services

- Contribute to the Scheme Design and general design Specification in accordance with the Project Brief.
- Carry-out on-site mitigation and monitoring, if required, as required, and formulate report upon completion, Includes all statutory license applications
- Contribute to consultation and liaison with adjoining owners or interests, including third parties and stakeholders.
 - Revise as necessary the Archaeological documentation following a review with the DTL and the CA and submit revisions for approval.
- Carry out examination and preparation of alternative design solutions, adjustments and design revisions as required to meet the Project Brief and Budget.
- Provide information to the Quantity Surveyor and other Consultants to enable quantification for preparation of cost estimates and Cost Plan.
- Assist the ALDT in the assessment and compliance with the conditions of final grant of planning permission, to include all associated technical reports as required.
- Assist the ALDT with responding, if required, to Additional / Further Information requests, planning appeal process if applicable.

- Assist in the preparation of a procurement strategy for the project with the DTL.
- Input to works requirements documents, all coordinated detailed design drawings and specifications for the works.
- Assist in preparation of Stage 2 reports for CA review

4.10 Assigned Certifier

- Prepare a preliminary inspection plan for issue with the tender documents.
- Prepare a Compliance Appraisal Record spread sheet that will identify the Certifier/Inspection Interface between Designers and the various parts of the Building Regulations as scheduled in the Code of Practice. This document should clearly identify the roles and responsibilities for certification, ancillary certification and submission at commencement notice stage

4.11 Design and Ancillary Certifier(s)

- Engage with the Assigned Certifier to develop the Compliance Appraisal Record.
- Prepare a risk assessment of specific elements to be identified in the Preliminary Inspection Plan and a compliance document for inclusion with the Tender Documents demonstrating that all aspects of the Building Regulations to which an Ancillary Certificate relates have been considered. The appraisal will serve as a preliminary assessment of compliance with the Building Regulations and will be coordinated with other Ancillary Certifier members of the Design Team by the Design Certifier

5 Stage 3 – Tender Action, Evaluation, Award

5.1 Architectural Services

- Act as DTL.
- Carry out all necessary actions leading to award of contracts.
- Prepare tender documents for main works and specialist works where appropriate
- Assess and advise on any requirements for site monitoring.
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary. Include specialist design team members as appropriate for qualitative assessment of specialist areas e.g. sustainable design
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Prepare Stage 3 report.

5.2 Mechanical & Electrical Engineering Services

- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Prepare tender documents for specialist(s) where appropriate.
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.3 Quantity Surveying Services

- Liaise with the LDA, PM and key members of the ALDT to define the technical evaluation criteria and award of marks.
- In conjunction with the LDA's advisers:
 - Advise on the use and/or amendment of the standard forms of building contract and contribute to drafting of particular client requirements
 - Confirm general insurance responsibilities for the Project and comment on the commercial impact,
 - Advise on bonds for performance and other purposes,

- Advise on the need for collateral warranties.
- Attend Tender Documents Review meeting with the Client to finalise the draft tender documents.
 - Finalise draft tender documents, incorporating any amendments identified at the Tender Documents Review meeting.
 - Review final draft tender documents prior to ITT issue. Assist and chair if necessary a tender document page turn workshop with the Design Team to ensure no gaps or deficiencies in design and tender documents.
 - Take instruction from the Employer prior to going to tender.
 - Provide documents in hard copy for the CA, if required.
- Tender:
 - Review and prepare draft responses to all PQQ queries received from potential candidates. Liaise with project team members, the LDA and key stakeholders to seek input where required.
 - Assist and provide input to any clarifications to be raised with potential candidates.
 - Review and comment on the pre-qualification submission and advise on shortlisting prospective tenderers as required.
 - Support the LDA project team, including procurement team in issuing the tender to the market.
 - Attend interviews with selected tenderers.
 - Check tender submissions for accuracy, level of pricing, pricing policy etc.
 - Advise on errors and qualifications in the tenders and, if necessary, negotiate thereon.
 - Prepare a draft Commercial Report on Tenders and Cost Report (format to be agreed with the Client) that includes:
 - detailed analysis, with accompanying commentary and opinion, of the costs submitted by tenderers.
 - details in respect of each cost headings including: Capex, FM Costs, and Lifecycle Costs (where applicable).
 - Professional report – executive summary, background, exclusions etc.
 - Review financial budget in view of tenders received and prepare updated Development Budget and revised cash flow.
 - Identify post tender Value Engineering opportunities.
 - Allow for Client review and incorporating Client feedback in respect of the Tender Technical Cost Report.
 - Chair a Tender Review meeting with the Client to review the draft Commercial Report on Tenders and Cost Report.
 - Finalise Commercial Report on Tenders and Cost Report, incorporating any amendments identified at the Tender Cost meeting and issue to Client.
- Attend pre-contract meetings with preferred tenderers to review any items the Contractor may be required to provide prior to contract signing. Review proposed programme for the Works and negotiate on behalf of the CA as required.
- Advise on any matters relevant to recommendation and appointment of the Contractor.
- Prepare any additional information necessary for the information of the Contractor to enable them to carry out the Works. This may include updates on Pricing Documents due to queries during tender process.
- Take instruction from the Employer regarding the award of the tenders.
- Draft letters for issue to unsuccessful tenders if required.

- Provide the Architect/ER/ Employer with the required documentation for contract signing, when requested.
- Coordinate and advise on any matters relevant to recommendation and appointment of the Contractor, including identification of possible cost savings required to maintain the Employer's budget.
- Preparing any additional information necessary for the information of the Contractors to enable him to carry out the Works. This may include updates on Pricing Documents due to queries during tender process.

5.4 Civil & Structural Engineering Services

- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Input into debriefing correspondence and attend debriefing & post-tender clarification meetings.
- Input into letters to successful candidates and execution of works contract.
- Advise in relation to requirement for advance purchase of any long delivery items which may affect programme.
- Provide clear unambiguous recommendation in relation to tender conclusion and contractor appointment
- Prepare tender documents for specialist(s) where appropriate.
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.5 Landscape Architectural Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013.
- Confirm compliance with PSDP duties in respect of this stage,
- Review any existing project Health & Safety documentation and amend/ supplement if necessary.
- Input to evaluation of contractors in relation to Health & Safety and site-specific design risks, risk assessments, construction methods statements, programme, etc.
- Evaluate the submissions received from contractors with respect to PSCS capacity & capabilities
- Review successful contractor's H&S plan to form part of the contract documentation
- Ensure appointment made in respect of Project Supervisor for the Construction Stage (PSCS)
- Provide all necessary copies of drawings and specifications for the contract documents
- Identify post tender value engineering options
- Input into Stage 3 report.

5.7 Planning and Environmental Consultancy Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.8 Traffic & Transport Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

5.9 Archaeology Consultancy Services

- Advice regarding special inspections or tests arising during the construction phase.
- Prepare tender documents for specialist(s) where appropriate
- Input to evaluation of the tender responses with regards to the proposed quality submission of the tenders in response to the Works Requirements; Provide detailed reports on tender conformity and merits of tenders. Participate on tender evaluation teams, as necessary.
- Provide all necessary copies of drawings and specifications for the contract documents
- Assess and advise on any requirements for site monitoring
- Identify post tender value engineering options
- Input into Stage 3 report.

6 Stage 4 – Construction

6.1 Architectural Services

- Act as DTL.
- Act as Employer’s Representative.
- As Employer’s Representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Take instructions from CA and obtain CA approvals on all occasions.
- Administer contract in a timely manner mitigating risk of future contractor claims
- Attend site to keep all relevant facts and documents in administrating claims and realistic account of actual progress and resources against contract and tender programmes
- Ensure contractor and site progress is achieved, design co-operation to avoid disputes (e.g. processing valid alternate proposals for submittals/works execution etc.)
- Support project construction and provide detailed drawings or clarification as required
- Review all contract & specialist design to ensure appropriate detailing is in place prior to construction. Attend all meetings and factory visits to ensure same.
- Update finishes board and obtain CA approval.
- Examine shop fabrication drawings prepared by the Contractor’s Sub-contractor, Specialists, or suppliers for the works.
- During the construction phase the Architect must review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Design details to achieve the performance outlined in the tender requirements – Request/Approve/Reject samples/submittals/mock-ups in a timely manner.
- Ensure detailed designs/ contractor proposals/ submittals meet the sustainable design performance objectives of the brief and fulfill the criteria of the client brief & LAP and incorporating the scope of services at 1.4.2 (i) sustainability specialist(s)
- Advise in relation to application of Liquidated Damages
- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the main contractor(s) and the rest of the ALDT
- Attend and issue notes on site walks and visits (minimum weekly)
- Chair monthly CA meeting with the rest of the ALDT
- Assist in the provision of monthly progress report to CA during this phase
- Issue a Draft building commissioning report prior to handover
- Issue Quality Check Sheets and Observe and report progress addressing same
- Liaise with site monitoring staff to ensure all works are being carried out to drawing and specification
- Request and examine collateral warranties for relevant specialist works
- Provide all necessary copies of drawings and specifications for the contract documents
- Perform the duties of Design Certifier under the Building Control (Amendment) Regulations 2014 and sign the Design Certificate in accordance with those Regulations. This will include but is not limited to:
 - Provide all necessary plans, specifications and documentation required for lodgement at commencement stage in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.

- Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.
- Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Assigned Certifier's Implementation Plan.
- At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
- Provide the Design Certifier Certificates.
- Clearly define areas of responsibility for certification of compliance of the design.
- In conjunction with the Assigned Certifier review the Builder's project programme for coordination with the Preliminary Inspection Plan.
- During the construction stage clearly define the inspection methodology and undertake individual inspections in accordance with the agreed inspection plan. Provide inspection reports in a format agreed with the Assigned Certifier.
- Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role. As lead designer ensure information is provided by other disciplines as required.
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014.
- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government's "Code of Practice for Inspection and Certifying Buildings and Works" (February 2014).
- Attend meetings as required with the Assigned Certifier.
- Assess and advise on any requirements for site monitoring.
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Coordinate and chair all site meeting with the contractor and specialists on site progress
- Manage the construction phase of the project and issue all necessary instruction to the contractor
- Receive and respond to Contractors and/or Specialist's Requests for Information (RFI) providing additional design input and/or clarification where required.
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- Report to CA as required.
- Accept/Reject necessary for achievement of Substantial Completion, report to CA on same.

- Provide certification that the works have reached substantial completion.
- Provide Final Account reports to CA in accordance with the works contract.
 - Advise CA in relation to achieving occupation of all or part of the building or early handover prior to issuing Substantial Completion
 - Complete final as built accessibility and fire safety audits and confirm compliance to original plan and regulations.
 - Ensure accurate and complete as-built information including all operating manuals is provided to the CA on a timely basis.
 - Agree snag list and timing with contractor, other ALDT members and CA.
 - Provide monthly progress reports to the CA.
 - Prepare Stage 4 Building Commissioning report for each phase that reaches Practical Completion.

Note the person identified as the Employers Representative (ER) will be required to attend all site meeting and site walks. Note all instructions are to be issued in writing through the ER.

6.2 Mechanical & Electrical Engineering Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the contractor(s) and rest of the ALDT
- Attend monthly CA meeting with the rest of the ALDT
- If required, carry out all necessary supervision of the works for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Review contractor and sub-contractor submittals as required to determine approvals or rejection of same.
- Give all necessary advice in a timely manner to the Employers Representative pertaining to services works being carried out to allow the orderly running of the contract
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014.

This will include but is not limited to:

- Provide all necessary plans, specifications and documentation required for submission in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.
- Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
- Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.
- Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Design Certifier and Assigned Certifier's Implementation Plan.

- At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
- Provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier.
- Clearly define their area of responsibility for certification of compliance of the design.
- As completion or phased completion approaches on the building, the Ancillary Certifier will witness such tests as required under their remit for demonstrating compliance with the relevant parts of the Building Regulations. The Ancillary Certifier will provide updated documentation if the building as completed is at variance with the documentation submitted at Commencement Notice Stage.
- Provide Ancillary Certificate(s) for design changes after Commencement.
- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government's "Code of Practice for Inspection and Certifying Buildings and Works" (February 2014).
- Attend all site meetings, site walks and visits
- Assist in the preparation of a Draft Building commissioning Report prior to Hand-over.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- On request from the Employer's Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Report to Employers Representative as required

The person identified as the lead/senior project Mechanical and Electrical Consultant will be required to attend all site meetings and walks. The Mechanical and Electrical Consultant may not issue instructions to the contractor. All Instructions must be issued in writing by the Employers Representative.

6.3 Quantity Surveying Services

- Provide cost advice to the Client on an as requested basis in relation to contract variations.
- Complete value engineering assessments / cost comparisons of various elements as required, e.g. external wall options, first floor joist construction, internal partitions versus blockwork walls etc. frame, elevation etc.
- Monitor design changes and provide updated information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.
- Attend regular meetings with the Contractor and the design team to review progress and cost control and quality of works.
- Provide Inspection Services on a regular basis for Interim Payments, Cost Reports, and monitoring.
- Check materials stored off site as required, and ensure compliance with contract conditions for payment.
 - Prepare recommendations for interim payments to contractors, sub-contractors, and suppliers in accordance with building contract requirements.
 - Attend regular meetings with the client with regard to progress and costs and prepare interim reports on same as required.
 - Prepare monthly Cost Reports (in LDA standard format if required) including, at a minimum, updated Cash Flow Expenditure, forecast final cost, variation log, programme contingency usage, commercial risks review and update, paid to date, breakdown of costs per tenure and phase or section and executive summary.
- Provide updates to Standardized LDA Typology assessment periodically based on current live cost data, as required.
 - Attend monthly cost review meetings with the CA. Issue minutes of these meetings when chaired by the QS.
 - Attend, for the duration of the construction of the Works, the relevant site meetings in order to monitor that the Works are being executed generally in accordance with the contract and instructions given to the Contractor.
 - Attend such additional site visits as are necessary to ensure that certain stages of the works are completed in compliance Contractors claims.
 - Attend sufficient regular meetings as required with the Contractor and the design team to review progress and properly administer and deliver a quality project within the required time and within budget.
 - Monitor, measure, negotiate and report on all Post Contract variations and/or Client instructed scheme amendments.
 - Manage of all contractor claims, variations, and extras up to the time they are referred to dispute procedures under the contract by either party.
 - Assist the Architect/ER in assessing (preparing reports as required) Change Orders, Extension of Time Request etc as they arise.
 - Prepare valuations for partial hand-over as required.
 - Assist in adjudicating on any dispute or difference relating to the works which may arise between the Employer and the Contactor. The scope of this engagement shall not extend to advising the Employer following the taking of any step in or towards any arbitration or litigation in connection with the Works.

6.4 Civil & Structural Engineering Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend fortnightly site meeting with the contractor(s) and rest of the ALDT
- Attend monthly CA meeting with the rest of the ALDT
- If required, carry out all necessary supervision of the works for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Examine and report on any variations and claims, including those resulting from delay / disruption, pertaining to Civil and Structural works being carried out to allow the orderly running of the contract
- Review contractor and sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- Assist in the preparation of a Draft Building commissioning Report prior to Hand-over.
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014.

This will include but is not limited to:

- Provide all necessary plans, specifications and documentation required for submission in accordance with the requirements of the code of practice for the Commencement Notice Stage. This will include a Compliance Appraisal, Drawings, Inspection Plan, Test and Commissioning Schedule, Schedules, and Ancillary Certificate.
- Arrange to provide sufficient information to the Assigned Certifier to enable them to fulfil their role.
- Inspect the works in accordance with the inspection plan, Inspection Notification Framework (INF) and contract documents. Report on this to the Assigned Certifier. At appropriate stages or intervals provide to the Assigned Certifier all ancillary certificates or test results which you have obtained. Advise the Assigned Certifier of any proposed amendments to your inspection plan during the work.
- Provide the necessary onsite inspection resources to comply with your obligations under the Building Control (Amendments) Act and the Design Certifier and Assigned Certifier's Implementation Plan.
- At agreed intervals with the Assigned Certifier, carry out work inspections which are pertinent to their elements of the design, and liaise with the Assigned Certifier in terms of this and the required ancillary certification.
- Provide the Ancillary Certificates when required by the Assigned Certifier and Design Certifier.
- Clearly define their area of responsibility for certification of compliance of the design.
- As completion or phased completion approaches on the building, the Ancillary Certifier will witness such tests as required under their remit for demonstrating compliance with the relevant parts of the Building Regulations. The Ancillary Certifier will provide updated documentation if the building as completed is at variance with the documentation submitted at Commencement Notice Stage.
- Provide Ancillary Certificate(s) for design changes after Commencement.

- At all times, observe the applicable requirements under the Department of the Environment, Community and Local Government's "Code of Practice for Inspection and Certifying Buildings and Works" (February 2014).
- Attend all site meetings, site walks and visits
- Receive and respond to Contractors and/or Specialist's Requests for Information (RFI) providing additional design input and/or clarification where required
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- On request from the Employer's Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents
 - Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
 - Report to Employers Representative as required

The person identified as the lead/senior project Civil/Structural Engineer will be required to attend all site meetings and walks. The Civil/Structural Engineer may not issue instructions to the contractor. All Instructions must be issued in writing by the Employers Representative.

6.5 Landscape Architectural Services

- Advice regarding special inspections or tests arising during the construction phase.
- Attend site meetings with the contractor the rest of the ALDT as necessary
- Attend CA meeting with the rest of the ALDT as necessary
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Liaise with the contractor to witness and review all performance testing prior to Substantial Completion
- If required, carry out all necessary supervision of the works (Landscaping) for which they are responsible and visit the site at intervals to monitor the progress of the works in accordance with the contract documents and good practice.
- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Perform the duties of Ancillary Certifier under the Building Control (Amendment) Regulations 2014 if / as required.
- At the periods for interim payment, provide advice or approval as required in relation to certification of payments to the Contractor in respect of the installations in accordance with the terms of the Contract. Carry out inspection and approval as required of materials, or other elements of the works in advance of delivery or payment.
- Participate as required in dispute resolution procedures in relation.
- Carry out inspection of the works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Employer's Representative of all snags and defects identified for issue to the Contractor. Carry out inspection of the defect's remedial works upon notification of their completion by the Contractor.
- On request from the Employer's Representative, provide certification that the works have reached substantial completion.
- Assist in the provision of monthly progress report to CA during this phase
- Provide all necessary copies of the contract documents
- Report to Employers Representative as required

The person identified as the lead/senior project Civil/Structural Engineer will be required to attend all site meetings and walks. The Civil/Structural Engineer may not issue instructions to the contractor. All Instructions must be issued by the Employers Representative.

6.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013.
- Advise and provide all necessary clarification and document to the ALDT to allow the timely progression of construction
- Carry out monthly site inspection of the construction works and issue a report of all finding/observation and concerns
- Monitor the performance of the PSCS and report any findings to the CA.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.

6.7 Planning and Environmental Consultancy Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.8 Traffic & Transport Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.9 Archaeology Consultancy Services

- Input to Contractors and/or Specialist's Requests for Information (RFI) responses providing additional design input and/or clarification where required
- Review Contractor and Sub-contractor submittals as required to determine approvals or rejection of same.
- Examine and report on any change orders and claims notified by the contractor or instructed by the Employers Representative
- Site monitoring, as necessary.
- Assist in the provision of monthly progress report to CA during this phase
- Report to Employers Representative as required

6.10 Assigned Certifier

- As part of the Inspection plan, and before the commencement of work on site, agree with The Employer and the Contractor an Inspection Notification Framework (INF), taking account of the building works involved and other factors.
- Before signing the form of Undertaking by the Assigned Certifier, exercise reasonable skill, care and diligence in checking that the documentation is appropriate for lodgement with the Commencement Notice.
- Schedule and obtain Ancillary Certificates from others. Coordinate, compile, and schedule relevant information to be submitted to the Building Control Authority as required under the regulations.
- In consultation with the members of the design team, plan and oversee the implementation of the Inspection Plan during Construction. On completion provide the Inspection Plan as implemented.
- Develop and agree wording of all certificates required.
- Co-ordinate and collate all certification of compliance (sub-certificates, ancillary certificates, warranties and tests as set out in the Inspection Plan) including for completion in conjunction with the Builder.
- On termination or relinquishment of appointment make available to the Building Owner all certification prepared and inspection reports carried out.
- Act as the single point of contact with the Building Control Authority during construction, including responding to requests for additional information by the Building Control Authority.
- Seek advice from the Building Control Authority, in respect of compliance matters relating to the building or works where disputes or differences of opinion arise between the parties to the project.
- Coordinate the inspection of the works by themselves and others and to certify the works on completion. Maintain records of inspection.

7 Stage 5 – Handover and Defects Period

7.1 Architectural Services

- Act as DTL
- Oversee snagging process as required, confirm progress to CA on ongoing basis.
- Obtain as-built drawings, specifications, and other relevant information as may be required by the CA from the contractor for review by design team and specialists. Review and if acceptable transfer full documentation package to CA in electronic format including as built Architectural, M&E, Civil/Structural and Specialist drawings (else pursue contractor for required revisions/updates).
- Ensure that the contractor provides sufficient information – including but not limited to as built drawings, specifications, test reports (e.g. air tightness tests, thermal imaging etc), EPD's, construction product information, and 3rd party certifications – to demonstrate that the sustainable design performance objectives of the brief have been met.
- Oversee and monitor completion of all post Practical Completion landscaping activities and services.
- Pass on relevant recommendations for the ongoing maintenance and care.
- As Employers Representative make determination in respect of any claims made by the contractors during the works and provide timely responses to same
- Determine any extensions of time under the contract.
- Arrange handover procedure, including final as built drawing issued to the contractor at the construction stage
- Arrange handover of the individual system and manufacturers' manuals and advise on maintenance contracts to enable the CA to operate and maintain the works
- Monitor agreement of the final account and issue report to the CA.
- Ensure snags or other defects which require urgent / immediate attention during the defects period are acted upon and closed-out.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- One month before the end of the defects periods as set out in the construction contracts(s), inspect the site and compile a list of defects in the works and issue a schedule of defects/snags to the CA for review if required, and issue to the Contractor.
- Liaise with contractor for close out all outstanding claims under contract
- Coordinate inspection at the end of the defects period
- Make recommendation on further retention of monies
- Prepare final report for issue to CA including lessons learnt
- Ensure accurate and complete as-built information including all operating manuals is provided to the CA on a timely basis.
- Administer retention period post Practical Completion including
 - Undertake final snagging of projects and close out of same to release final retention
 - Liaise with specialist as necessary to resolve issues

7.2 Mechanical & Electrical Engineering Services

- In conjunction with Employer's Representative, oversee the snagging process as required.

- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.3 Quantity Surveying Services

- Negotiate and agree Main Contract Final Accounts including all Contractor claims, variations and extras instructed by the Design team.
- Provide final information in relation to quantification of materials for input into embodied carbon analysis and whole life carbon assessments to be carried out by the sustainability specialist(s) to EN 15978.
- Liaison with Design Team and Client on Post Contract Issues.
- Produce a full Final Account Report for the CA, broken down into tenures and phases / sections. Including final LDA Standardized Typology assessment based on out-turn costs.
- Provide feedback to the LDA including lessons learned capturing areas of processes / procedures / documentation that could be improved to assist the LDA in maximizing value and minimizing risk going forward.
- Make available relevant, key personnel to the CA in the event of the Controller Auditor General and/or the Public Accounts Committee or other publicly appointed body wishing to discuss the public sector aspects of the procurement.
- Liaise with Contractor and client at the end of the defects liability period to ensure that Final Account / Final Statement is agreed. It is envisaged that the defects liability period will be 15 months.
- Conduct a design review, including Analysis of Outturn Cost and operation risk review, for submission to Employer.

7.4 Civil & Structural Engineering Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.5 Landscape Architectural Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.6 Project Supervisor Design Process (Health & Safety PSDP) Services

- All the duties of Project Supervisor for the Design Process according to the Safety, Health and Welfare (Construction) Regulations 2013, notwithstanding any inconsistent Contract contents.
- Liaise with DTL, ALDT members and the contractor in relation to the provision of the Safety File to include Health & Safety risk assessments, Operation & Maintenance files (O&Ms), as-built drawings, detailed technical specifications, Specialist works as-built drawings and specifications, all results of specialist's test or any other tests carried out during the course of the project, Maintenance Specifications or other relevant documentation.
- The Safety File should include all relevant information to enable the building to be occupied and maintained safely and future changes to be made with full knowledge of the hazards and risks. Where appropriate it should incorporate details of the building, or the mechanical and electrical services systems, manufacturers' operational instructions, supplier references, checklists, test certificates and other maintenance details.
- Advise the CA and ALDT of duties and responsibilities arising from the Safety Health and Welfare Act 2005 and associated regulations and Orders arising from the Act.
- The Employer's Representative should check with the PSDP before issuing the Substantial Completion Certificate. All substantive elements (sufficient to allow safe occupation of the building) of the Safety File should be complete before Substantial Completion, and any supplementary information must be in place within three months of that date.
- Where substantive elements of the Safety File are incomplete due to the failure of the Contractor or Project Supervisor (Construction Stage) to cooperate or provide the requisite information, the PSDP should so advise the Employer's Representative who should not issue Substantial Completion until the relevant information is provided.

7.7 Planning and Environmental Consultancy Services

- In conjunction with Employer's Representative, oversee the snagging process as required.
- Pass on relevant recommendations for the ongoing maintenance and care.
- Assist the Employers representative make determination in respect of any claims made by the contractors during the works, including extensions of time, and provide timely responses to same
- Provide input and assistance as required to the Quantity Surveyor in settlement of variations and completion of the final account.
- Regularly visit the site during the defects period to monitor the close-out of snags and defects, and report to the CA as required.
- Visit the site during the defects period to assess defects, in conjunction with the ALDT, and follow-up with the close-out of same with the Contractor(s) etc.
- At the end of the Defects Period, carry out a final defect's inspection, and on satisfactory completion of all defects, notify the Employer's Representative accordingly
- Report to Employers Representative as required

7.8 Assigned Certifier

- At completion stage, submit the following to the Building Control Authority:
 - Certificate of Compliance on Completion signed by the Builder (at Part A) and by the Assigned Certifier (at Part B)
 - Plans, calculations, specifications and, showing how the completed building has achieved compliance with the Building Regulations must be lodged on the Building Control Management System when the Certificate of Compliance on Completion is submitted or at an earlier date. Where design documents have changed or supersede design documents previously lodged with the Building Control Authority with the Commencement Notice or later, any such difference should be clearly identified
 - The Inspection Plan as implemented by the Assigned Certifier in accordance with this Code of Practice.

7.9 Multi-Disciplinary Services on Handover

7.9.1 Final Account Report

- After receipt of the Final Statement the Final Account must be agreed and the Employer's Representative shall issue to the Client a Final Account Report including a Quantity Surveyor's Report. Timelines for this activity are to be agreed on a project by project basis.
- The ALDT, PM and QS recommendation for payment of the adjusted Contract Sum must be detailed in this report with the following appendices:
 - The summary section only of the Draft Final Account.
 - Quantity Surveyor's Final Account Report.
 - Written Confirmation from the Project Supervisor Design Process and the Client that the completed Safety File has been handed over to the Client.
 - A copy of the Architect's Opinions on Compliance of the Works with Planning and Development Acts and with the Building Regulations.
 - Copies of all guarantees provided for in the Contract Documents.

7.9.2 Defects Period

- On completion of the Defects Period, the IDT must agree and confirm in writing to the Client that the work is complete, and all defects have been corrected within this period.
- The final certificate can now be issued.
- Phasing may be required subject to the project programme.

7.9.3 Final Account Report Supplement

The ALDT must submit a Final Project Report to the Client on completion of the Defects Period, subject to agreement with the client that all defects have been addressed. This report should include the following Supplement to the Final Account Report:

- The summary section only of the agreed Final Account.
- Written confirmation of both Client and IDT that the work is complete, and all defects have been corrected within the Defects Period.

- The Architect's Report on the Building Works and the Contractor's performance during the Building Contract.
- Civil/Structural Engineer's Report on the civil/structural works and the quality of the work.
- Building Services Engineer's Report on the Mechanical and Electrical Services, and the quality of the Mechanical and Electrical installation

8 General Services for All Stages

8.1 Fire Safety Engineering

- Fire Safety Engineering design services are included in the Design Team for all stages of the project.
- Design Stages:
 - Provide general advice on the need to obtain a Fire Safety Certificate, comply with Building Regulations and with other statutory requirements
 - Provide enough preliminary information in relation to the project in the form of advice, sketch drawings, schematic layouts, reports or outline specifications to enable the lead designer to prepare outline proposals, concept proposals, developed design proposals and detailed design proposals
 - Obtain from and discuss with our other consultants' proposals, designs and outline specifications as to architectural, civil and structural, mechanical and electrical elements and requirements and co-ordinate these requirements with the fire safety engineering solution.
 - In conjunction with our other consultants, assist the architect in the preparation of a Preliminary Design Report and Cost Plan in respect of the final scheme design, illustrating the scheme in scale plans, sections and elevations and specifications in sufficient detail to enable The Client to approve spatial arrangements, materials and appearance, and reporting as to all the above issues required to be dealt with under this work stage.
 - Formally confirm that the architectural drawings are compliant with the fire safety regulations and with your advice and that a fire safety certificate can be obtained based on the architectural layouts.
 - Review the Architectural Design at each design iteration and confirm that the fire safety engineering requirements are incorporated
 - Review the M&E Design at each design iteration and confirm that the fire safety engineering requirements are incorporated in the design document.
 - Review the Civil and Structural Design at each design iteration and confirm that the fire safety engineering requirements are incorporated in the design document.
 - Review of the design proposals and advising on any necessary changes vis-à-vis the achievement of compliance with relevant requirements of Part B (Fire) of the Second Schedule to the Building Regulations.
 - Advising the Architects and other members of the design team on the information required for inclusion with the Fire Safety Certificate Application/Report if required as part of the project.
 - Preparation of fire engineering analysis for those aspects of the design which deviate from the recommendations in the guidance documents.
 - Advise the Design Team of a Fire Strategy dealing with any fire safety engineering aspects of the design, exploring alternative solutions and identifying any possible alternative

- options. This will include fire engineering analysis and modelling of maximum compartment size, fire growth, smoke movement and occupant response.
- Advise the Design Team on detailed design and specification of all items arising from the fire safety requirements of the project. These include, but are not limited to doors, wall construction, ceiling construction, floor coverings, service routes, ducts, alarms, smoke and heat detectors and suitability of building materials generally where they are material to fire safety aspects of the project.
 - Advise the Design Team of specific functions and/or elements of accommodation within the design which affect fire safety e.g. storage of waste, gases, fuels, location of vents, effect of deliveries.
 - Commission Computational Fluid Dynamic studies where required to prove the design proposal.
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Existing means of escape and required alterations – location, number, size, specification of stair cores and access/egress points; travel distances; protected escape routes; phasing proposals.
 - Construction – fire resistance of new structure, compartmentation.
 - Elevations – distance to relevant boundaries and requirements for fire rating elevations if required.
 - Existing Fire Fighting Facilities and required alterations to these– means of fighting fire and the need for hydrants around the site, firefighting access roadways, internal fire mains, testing, maintenance and storage of equipment etc.
 - Active Fire Safety Systems – requirements for smoke control requirements such as venting, emergency lighting, fire detection and alarm etc.
 - Site wide fire safety issues relating to the interaction of the building with other areas of the site.
 - Examining and investigating options for alternative uses within fire strategy.
 - Investigating multi occupancy layouts and use of building in relation to fire strategy.
 - Fire Certificate application and associated process:
 - Consult as necessary with Building Control authorities, the Fire Brigade and statutory undertakers about any matters of principal in connection with the design of the project.
 - Preparation of Fire Safety Certificate Compliance Reports for the building including relevant drawings for submission for an application for a Fire Safety Certificate and other relevant support information, demonstrating compliance with the relevant requirements of Part B (Fire) of the Building Regulations.
 - Consultations / negotiations as necessary with the Building Control Authority during the course of their consideration of the Fire Safety Applications.
 - Duly respond to all requests from the local authority for additional information during the planning application process.

- Produce amended drawings, analysis, modelling and reports in response to RFI, clarifications/modifications, and appeal(s) as required.
 - Preparation of additional information as may be required by the Local Authority Fire Department, including further fire engineering analysis and computer modelling as necessary.
 - Making the applications for Fire Safety Certificates to the relevant local authorities.
 - Produce amended drawings in response to oral hearing information and further information on queries and clarifications if required. Attendance at legal briefings, design team meetings, oral hearing, and preparation of witness statement and any related services.
 - Tender Document
 - Arrange for a detailed review with the Architect and the Client of the Fire Safety Engineering drawings and specifications, and formally confirm that they have been prepared in accordance with the agreed brief and that they are consistent with the architectural drawings.
 - Revise as necessary the Fire Safety Engineering documentation following the above detailed review with the Architect and the Client and submit revisions for Client/ Project Manager Approval.
- Construction
 - The Consultant shall provide further information as is reasonably necessary, in his opinion, to enable contractors and/or sub-contractors to prepare installation drawings.
 - The Fire Safety Engineering designer shall examine installation drawings, shop drawings and builders work details submitted by contractors and/or sub-contractors for the fire safety works or parts thereof to ensure compliance with building regulations, standards and the fire safety certification documentation.
 - The Fire Safety Engineering designer shall advise The Client through the lead consultant on the need for special inspections or tests arising during the construction of the Works.
 - The Consultant shall assist the rest of the professional team in examining Contractors' and/or Sub-contractors' proposals as may be required by contracts for the Works.
 - Assist in providing a response from the design team and advise on the effects of a proposed change to the design of the project, in accordance with the change control procedures.
 - The Fire Safety Engineering designer shall examine the proposals of Contractors or Sub-Contractors for carrying out commissioning procedures and performance testing in relation to the fire safety works. Comment to The Client on any requirements of these proposals affecting the programme for the Works
 - Provide information to, discuss proposals with and co-ordinate your production information with the input of our other consultants and of any relevant specialists.
 - The Fire Safety Engineering designer shall examine the results of commissioning and the documentary records. Inspect the Works on completion and, in conjunction with the professional team, record any defects. Obtain from the Contractor all test and commissioning reports required to verify the correct operation of the systems involved, having witnessed commissioning test where appropriate and commissioning reports and confirm that this work has been completed satisfactorily. Review and approve the certificates for design, installation and commissioning / completion, furnished by others,

- in respect of all fire safety elements e.g. fire stopping, structural fire protection, fire door sets, life safety systems (fire detection and alarm, PA, CCTV, smoke control system etc.).
- Inspect the site as required in the Inspection Plan and issue the corresponding inspection reports recording progress, quality and cost. Monitor that defects identified are being corrected by the contractor.
 - Where necessary advise on the need for any additional inspections and/or tests required. Where appropriate propose recommended suppliers, provide brief and obtain costs for the provision of such additional tests.
 - As appropriate make recommendations for sample-taking and the carrying out of tests of materials and workmanship and examine the conduct and results of such tests whether on or off-site.
 - As appropriate make recommendations for the opening up of work to determine that it is generally in accordance with the Building Contract.
 - Carry out regular visits to the works for the purpose of supervision, monitoring and inspection, to confirm that the fire safety works are being carried out in accordance with the Contract
 - In conjunction with the other consultants, review and comment on Contractors, sub-contractors or Specialists' proposals and programmes for commissioning and performance testing of the works. Where required, witness commissioning and testing.
 - Carry out inspection of the fire safety engineering works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Contract Administrator and Project Manager of all snags and defects identified for issue to the Contractor. Carry out inspection of the remedial works upon notification of their completion by the Contractor.
 - If reasonably requested to do so, inspect materials delivered to Site.
 - If reasonably requested to do so, visit the sites of fabrication and assembly of structural elements to inspect such materials and workmanship before delivery to the Site.
 - Assist in evaluation of any outstanding works still to be completed prior to confirmation of Practical Completion.
 - On request from the Contract Administrator, provide certification that the fire safety engineering works have reached Practical Completion.
 - Preparation & submission of an Opinion of Compliance with the relevant requirements of Part B (Fire) of the Building Regulations.
 - Provide Ancillary Certifier's Certificates on completion to the assigned certifier and the client.
- Handover, Close out and post occupancy Services:
 - Inspect the Works and prepare a snagging report in the period leading up to practical completion of the Works and/or any section thereof under the Building Contract. Confirm to The Client in writing whether any significant items of work exist which may prevent the Works or any such section thereof from satisfying the requirements of practical completion under the Building Contract.
 - Development and control of Fire Safety Management files for premises
 - Development of Fire Safety Management procedures for the premises.
 - Contribute to the timely completion of the 'punch list' items on the project.
 - Attend and contribute to post project evaluation.

- Provide advice and recommendations to the Client in relation to Building Maintenance as it relates to fire safety elements, and the training of the managers and maintenance staff who will be responsible for the operation, safety and maintenance of the new facility. Participate in training and maintenance seminar.
- Provide services required in connection with the Defects Liability Period under the Building Contract and the making good of defects. After Practical Completion and before the end of the defects' liability period, visit site with the Architect/Client to check operation of installations and advise regarding the correction of any operational difficulties that may exist. Issue report on this visit to all parties.
- In conjunction with Other Consultants, monitor the Project Defects Liability Period. Compile a list of defects of work, one month before the end of the Defects Liability Period and issue coordinated Project Team's defects list to the contractor. During Defects Liability Period instruct the Contractor on any urgent defects that require immediate attention.

8.2 Disability Access Engineering

- Disability Access Engineering design services are included in the Design Team for all stages of the project.
- Design Stages:
 - Provide general advice on the need to obtain a Disability Access Certificate, comply with Building Regulations and with other statutory requirements.
 - Advise on the implementation of universal design standards.
 - Provide enough preliminary information in relation to the project in the form of advice, sketch drawings, schematic layouts, reports or outline specifications to enable the lead designer to prepare outline proposals, concept proposals, developed design proposals and detailed design proposals
 - Obtain from and discuss with our other consultants' proposals, designs and outline specifications as to architectural, civil and structural, mechanical and electrical elements and requirements and co-ordinate these requirements with the disability access engineering solution.
 - In conjunction with our other consultants, assist the architect in the preparation of a Preliminary Design Report and Cost Plan in respect of the final scheme design, illustrating the scheme in scale plans, sections and elevations and specifications in sufficient detail to enable The Client to approve spatial arrangements, materials and appearance, and reporting as to all the above issues required to be dealt with under this work stage.
 - Formally confirm that the architectural drawings are compliant with the disability access regulations and with your advice and that a disability access certificate can be obtained based on the architectural layouts.
 - Review the Architectural Design at each design iteration and confirm that the disability access engineering requirements are incorporated. Advise on potential design improvements aligned universal design requirements.
 - Review the M&E Design at each design iteration and confirm that the disability access engineering requirements are incorporated in the design document.
 - Review the Civil and Structural Design at each design iteration and confirm that the disability access engineering requirements are incorporated in the design document.

- Review of the design proposals and advising on any necessary changes vis-à-vis the achievement of compliance with relevant requirements of Part M, Part K and all relevant parts of the Second Schedule to the Building Regulations.
- Advising the Architects and other members of the design team on the information required for inclusion with the Disability Access Certificate Application/Report if required as part of the project.
- Preparation of disability access engineering analysis for those aspects of the design which deviate from the recommendations in the guidance documents.
- Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Review advise and report to the Client on the general design concepts in respect of optimum building design layout to provide for:
 - Existing means of escape and required alterations – location, number, size, specification of stair cores and access/egress points; travel distances; protected escape routes; phasing proposals.
- Disability Access Certificate application and associated process:
 - Consult as necessary with Building Control authorities and statutory undertakers about any matters of principal in connection with the design of the project.
 - Preparation of Disability Access Certificate Compliance Reports for the building including relevant drawings for submission for an application for a Disability Access Certificate and other relevant support information, demonstrating compliance with the relevant requirements of Part M and associated part of the Building Regulations.
 - Consultations / negotiations as necessary with the Building Control Authority during the course of their consideration of the Application.
 - Duly respond to all requests from the local authority for additional information during the planning application process.
 - Produce amended drawings, analysis, modelling and reports in response to RFI, clarifications/modifications, and appeal(s) as required.
 - Preparation of additional information as may be required by the Local, including further analysis as necessary.
 - Making the applications for Disability Access Certificate to the relevant local authorities.
 - Produce amended drawings in response to oral hearing information and further information on queries and clarifications if required. Attendance at legal briefings, design team meetings, oral hearing, and preparation of witness statement and any related services.
- Tender Document
 - Arrange for a detailed review with the Architect and the Client the drawings and specifications, and formally confirm that they have been prepared in accordance with the agreed brief and that they are consistent with the disability access certificate granted.
- Construction
 - The Consultant shall provide further information as is reasonably necessary, in his opinion, to enable contractors and/or sub-contractors to prepare installation drawings.

- The Disability Access Designer shall examine installation drawings, shop drawings and builders work details submitted by contractors and/or sub-contractors for the relevant works or parts thereof to ensure compliance with building regulations, standards and the disable access certification documentation.
- The Disability Access Designer shall advise The Client through the lead consultant on the need for special inspections or tests arising during the construction of the Works.
- The Consultant shall assist the rest of the professional team in examining Contractors' and/or Sub-contractors' proposals as may be required by contracts for the Works.
- Assist in providing a response from the design team and advise on the effects of a proposed change to the design of the project, in accordance with the change control procedures.
- The Disability Access Designer shall examine the proposals of Contractors or Sub-Contractors for carrying out commissioning procedures and performance testing in relation to part M and granted disabled access certificate. Comment to The Client on any requirements of these proposals affecting the programme for the Works.
- Provide information to, discuss proposals with and co-ordinate your production information with the input of our other consultants and of any relevant specialists.
- The Disability Access Designer shall examine the results of commissioning and the documentary records. Inspect the Works on completion and, in conjunction with the professional team, record any defects. Obtain from the Contractor all test and commissioning reports required to verify the correct operation of the systems involved, having witnessed commissioning test where appropriate and commissioning reports and confirm that this work has been completed satisfactorily. Review and approve the certificates for design, installation and commissioning / completion, furnished by others in respect of all disability access elements e.g. disabled refuge calling stations, automated opening devices etc.
- Inspect the site as required in the Inspection Plan and issue the corresponding inspection reports recording progress, quality and cost. Monitor that defects identified are being corrected by the contractor.
- Where necessary advise on the need for any additional inspections and/or tests required. Where appropriate propose recommended suppliers, provide brief and obtain costs for the provision of such additional tests.
- As appropriate make recommendations for sample-taking and the carrying out of tests of materials and workmanship and examine the conduct and results of such tests whether on or off-site.
- As appropriate make recommendations for the opening up of work to determine that it is generally in accordance with the Building Contract.
- Carry out regular visits to the works for the purpose of supervision, monitoring and inspection, to confirm that the relevant works are being carried out in accordance with the Contract
- In conjunction with the other consultants, review and comment on Contractors, sub-contractors or Specialists' proposals and programmes for commissioning and performance testing of the works. Where required, witness commissioning and testing.
- Carry out inspection of the relevant works on completion of the works, or part of the works where applicable, and prepare a list of Defects. Notify the Contract Administrator and Project Manager of all snags and defects identified for issue to the Contractor. Carry

out inspection of the remedial works upon notification of their completion by the Contractor.

- If reasonably requested to do so, inspect materials delivered to Site.
- If reasonably requested to do so, visit the sites of fabrication and assembly of structural elements to inspect such materials and workmanship before delivery to the Site.
- Assist in evaluation of any outstanding works still to be completed prior to confirmation of Practical Completion.
- On request from the Contract Administrator, provide certification that the disabled access and Part M works have reached Practical Completion.
- Preparation & submission of an Opinion of Compliance with the relevant requirements of Part M (Access) of the Building Regulations.
- Provide Ancillary Certifier's Certificates on completion to the assigned certifier and the client.
- Handover, Close out and post occupancy Services:
 - Inspect the Works and prepare a snagging report in the period leading up to practical completion of the Works and/or any section thereof under the Building Contract. Confirm to The Client in writing whether any significant items of work exist which may prevent the Works or any such section thereof from satisfying the requirements of practical completion under the Building Contract.
 - Contribute to the timely completion of the 'punch list' items on the project.
 - Attend and contribute to post project evaluation.
 - After hand-over and before the end of the defect' liability period, visit site with the Architect/Client to check operation of installations and advise regarding the correction of any operational difficulties that may exist. Issue report on this visit to all parties.
 - In conjunction with Other Consultants, monitor the Project Defects Liability Period. Compile a list of defects of work, one month before the end of the Defects Liability Period and issue coordinated Project Team's defects list to the contractor. During Defects Liability Period instruct Contractor on any urgent defects, which require immediate attention.
 - At the end of the Defects Period, carry out a final defects' inspection, and on satisfactory completion of all defects, notify the Contract Administrator accordingly.

The LDA reserves the right to terminate the contract at any point throughout the process.