



Ripon Museums Trust

Fairer Futures

Tender Brief



Quantity Surveyor

1. Introduction

Ripon Museum Trust (RMT) was established in 1982 and runs three museums in the heart of Ripon. We are a small Registered Charity and Limited Company. RMT tells the interlinked story of poverty, law, crime, punishment and justice - using a Grade II Victorian Workhouse Museum, Grade II* Liberty Gaol and Police Station, Grade II* Georgian Courthouse and a collection of 9000 objects to explore our themes. Community engagement helps us share stories of this unique heritage prompting people to act for a fairer society. We tell the story of the buildings themselves, the people who lived and worked in them and across all three sites. We put learning at our heart - delivering a changing programme of exhibitions, events, school visits and informal group learning. **Learning is a key Value for RMT – whether directly delivering learning activities, supporting learning within our communities or as continuous organisational learning.** RMT is an Accredited Museum and a Band One National Portfolio Organisation (NPO) with Arts Council England (ACE).

Our Trust's Vision is to use our Heritage Assets to Inspire People to Seek a Fairer Society. Our Museums' Mission is to use the unique trio of the Workhouse, Prison & Police and Courthouse Museums, collections and the stories they tell to help people explore big issues such as fairness, equality, justice and welfare. Through excellent engagement, programming and outreach, together we will inspire people to become compassionate and active citizens, shaping society for the better. We will work for greater participation in our heritage which will enrich lives and improve wellbeing. Volunteering is integral to our organisation; at our core we work as one team. We will make a positive impact on Ripon and the region's cultural and economic capital.

Ripon Museum Trust is an equal opportunity employer and adheres to Fair Recruitment. We welcome applications from all suitably qualified persons regardless of their race, sex, disability, religion/belief, sexual orientation, gender or age. We have an Equality and Diversity Policy, Safeguarding Policy and procedures and Data Protection Policies. We are committed to reducing our carbon footprint and have an Environmental Policy.

RMT wishes to appoint an experienced quantity surveyor to the consultancy team. The Consultant shall provide services to support both the design and construction of the project. It is intended that the project Quantity Surveyor will be appointed on an RICS Standard Form of Consultant Appointment.

2. The National Lottery Heritage Fund (NLHF) project

Our 'Fairer Futures' Project is worth £2.25M and is a substantial first step to delivering our 'Master Plan' for the Trust's future. Delivery of this Project will make significant strides towards achieving our Vision, transform the visitor experience and our engagement work with communities. It will create inclusive new spaces in the Workhouse Museum, open up previously unseen rooms and make our heritage accessible to a wider more diverse audience across all three museums. The Project will use joined up stories of the people who lived, worked and suffered at our three sites. We will make better use of our outdoor spaces and of digital techniques for more immersive engagement. The Project will secure our future and lower our carbon footprint through environmentally sustainable building improvements. The idea for our Project was born out of unease with growing social inequalities which have been exacerbated by the pandemic. A powerful new Vision for the use of our heritage emerged; to use it to inspire people to seek a fairer society. Over the last 3 years we have continued to develop these ideas and we have consulted widely. Our Project has six key strands:

- **Conservation** of key areas of the Workhouse i.e. Main Block (recently acquired with a Heritage Lottery Fund grant). Conservation work will provide us with new spaces for activities, interpretation and learning. A lift will give access to the former dormitories which will be restored. We will prioritise eco-friendly design; a new roof, an air source heating system and improved insulation which will reduce our carbon footprint and help us become more resilient. Access to and conservation of these areas will ensure preservation of the stories and heritage for the future.
- New **interpretative techniques** will connect stories and visitor experiences across all three museums. With communities we will tell multi-layered stories of those who lived and worked here, bringing the story up to date. We will create a better-quality visitor experience, use digital and other interpretation for outdoor spaces at the Workhouse, improved internal spaces for learning, volunteering and other programming.
- **Community engagement** and co-production will build on our work with people whose voices are often invisible in history. There will be exciting opportunities for new activities at all our museums engaging new people and communities and for placemaking. These build on our work as a NPO and the unique projects we have already delivered.
- Our work to improve **wellbeing** will be built into our activities and reflects our ambition to become a place that demonstrably improves people's wellbeing.
- **Volunteering** is at the heart of what we do, and we will expand and build on this work.
- The value of our work on **placemaking** will increase by generating community wellbeing. We'll build on successful partnerships to develop activities to better explain our heritage. The Project will feed into master planning for the regeneration of Ripon's economy and bringing a wider sense of history and place.

3. Scope

The former Ripon Union Workhouse is situated off Allhallowgate, Ripon. The Ripon Workhouse Museum is located within the former Gatehouse Block and Main Block, with a workhouse garden in the north-east of the site. The main block and gatehouse are both Grade II listed buildings and lie within the Ripon Conservation Area.

The anticipated construction cost is in the order of £789,400 exclusive of VAT, preliminaries and contingency.

Fees are required for RIBA stages 1-7, but the initial appointment would only be up to the completion of RIBA Stage 3. Reappointment for the Delivery Phase is subject to a break clause which is dependent on securing the funding, along with performance during the development phase.

A detailed and completed scope of services form using the RICS scope can be found in the supporting information.

In addition to the standard form of services identified RMT also require:

- The QS to support the Project Manager and client team with the completion of Financial Reporting, as defined by the within their Project Reporting Guidance.
- The QS is to be responsible for assisting in the generation and maintenance of a 'global project' budget that is inclusive of all items in addition to the construction cost plan that form the project costs. This will likely entail assisting with the monitoring of professional fees, ancillary works such as interpretation, and activity costs.
- Should the project be required to undertake a value engineering process, then it is expected that the QS will contribute to and identify areas of savings, and to update the outputs of a VE process in a revised cost plan. This should be done in a timely manner to allow for referral and decision making by the client team prior to making any decisions on tendering or contract award.
- The QS is to be present at Project team meetings that are scheduled on a monthly basis to report on costs as appropriate.

4. Timetable

The Development Phase work should be carried out from appointment March 2023 with a draft RIBA2+ plan available by the Mid Term Review currently planned for August 2023 (or other date for mid-stage review as agreed with National Lottery Heritage Fund), and a final RIBA 3 plan submitted in time for the collation of the Delivery Phase application. The programme will be worked up in further detail with the appointed team but there is currently a desire to work to a November second round submission which it is noted is challenging and will require further discussion. The programme had a hard deadline of completion by February 2024.

The Delivery stage will be carried out dependent on National Lottery Heritage Fund Permission to start currently projected as May 2024 – Spring 2026.

5. Fees

There is a budget of £6,150 (excluding VAT) for the development stage of work and £13,235 (excluding VAT) for the Delivery Phase. The fee is inclusive of all travel/subsistence.

The budget for the construction is currently £789,400 (excl of VAT) *not including* preliminaries or contingencies.

6. Timescales

Brief supplied	January 4 th 2023
Deadline for questions	5pm 27 th January 2023
Submission	12pm 6 th February 2023
Interviews	w/c 20 th February 2023
Consultants appointed	w/c 6 th March 2023
Development Phase contract completed (break clause)	November 2023

7. Submission requirements:

- Proven track record within the last 3 years, of this kind of heritage and conservation project (with National Lottery Heritage Fund funding).
- A full statement on your proposed approach to completing the work, including a methodology. This should set out your approach to ensuring that the work is delivered on time, within budget and to the quality required. It should also detail how you will work with the wider team.
- Detail your approach to value engineering and how you will support the project through this process.
- Overall cost, with a breakdown of costs for all team members relating to each stage of work, including daily charge out rate for each team member and anticipated expenses. Travel time for site visits should be clearly set out and are included in the total fixed fee.
- CVs (4 pages each max) and contact details off each member of the team) to be assigned to undertake the role, including a short summary demonstrating their suitability, qualifications and experience including membership of relevant professional bodies and adherence to professional standards.
- Details of two referees for work of a similar nature within the last 3 years
- Environmental Policy including the supply of goods and services and reducing carbon footprint.
- Provide evidence of Insurances required – Professional Indemnity of £2m, Public Liability of £5m, Employers' Liability £5 million
- State availability for interview in w/c 20th February
- Maximum Tender page length 10 pages (excluding CV's)
- Tenders must be signed by CEO, business owner or equivalent senior representative of the Consultancy.

Please contact our appointed project manager Elanor Hazlehurst on 01543 414 77 or via email at elanor.hazlehurst@greenwoodprojects for all enquires or site visits requests. Please return all submissions to Elanor Hazlehurst via elanor.hazlehurst@greenwoodprojects.com by **12pm February 6th 2023**.

8. Selection Information

Submissions will be assessed on; appropriate experience; a clear understanding of the requirements of the project; a proven track record of successful delivery of similar projects. We would also like to see evidence of good team working and of successful completion of National Lottery Heritage Fund funded projects.

- Selection will be based on a Price/Quality Scoring split of 30%/70%.

Qualifications & Experience – 30%

Approach – 30%

Price – 40%

- Panel Interviews
- References
- National Lottery Heritage Fund Sign Off

Please see below for an outline of the evaluation criteria:

Evaluation Criteria	Rating (0-5)	X	Weight	=	Total
Related Project Experience					
a. Qualifications and experience of the proposed team. As detailed on CV's supplied		X	3	=	
2. Proven track record within the last 3 years, of this kind of heritage and conservation project (with National Lottery Heritage Fund funding).		X	3	=	
Proposed Methodology					
a. A full statement on your proposed approach to completing the work, including a methodology. This should set out your approach to ensuring that the work is delivered on time, within budget and to the quality required. It should also detail how you will work with the wider team.		X	3	=	
b. Detail your approach to value engineering and how you will support the project through this process.		X	3	=	
Price					

Fixed and Firm Cost with full breakdown of day rate, resource allocation and expenses					
Grand Total					

Price Evaluation

Price will count for 40 marks and will be evaluated on the basis of each Tenderer's tendered prices as set out.

The lowest overall tendered price will score full marks for price.

The marks for price for each other Tender will be calculated by the following formula:

$$\text{Maximum marks for Price} \times \frac{\text{Price of lowest priced Tender}}{\text{Price of Tender being evaluated}}$$

9. Additional Information

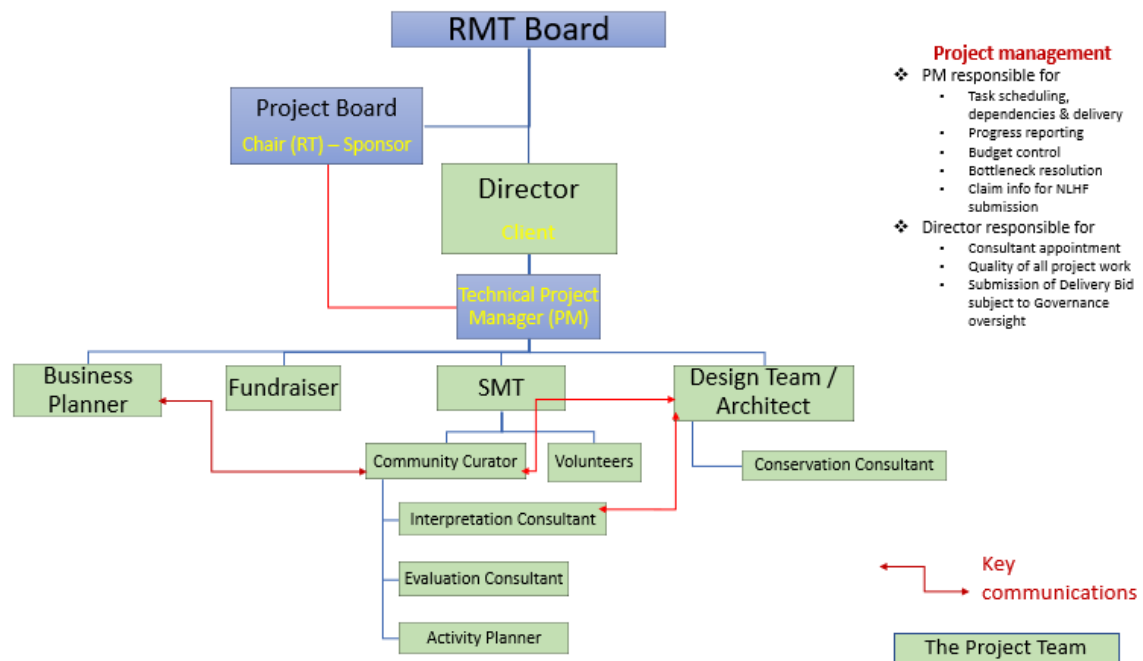
Tenderers must keep their tenders open for 90 days. RMT is committed to procuring goods, works and services locally whenever possible and in an environmentally responsibility manner. We are committed to equality and diversity and will assist tenderers to gain access to the process. We will use guidance from the National Lottery Heritage Fund for the creation of Briefs and Contracts.

10. Form of appointment

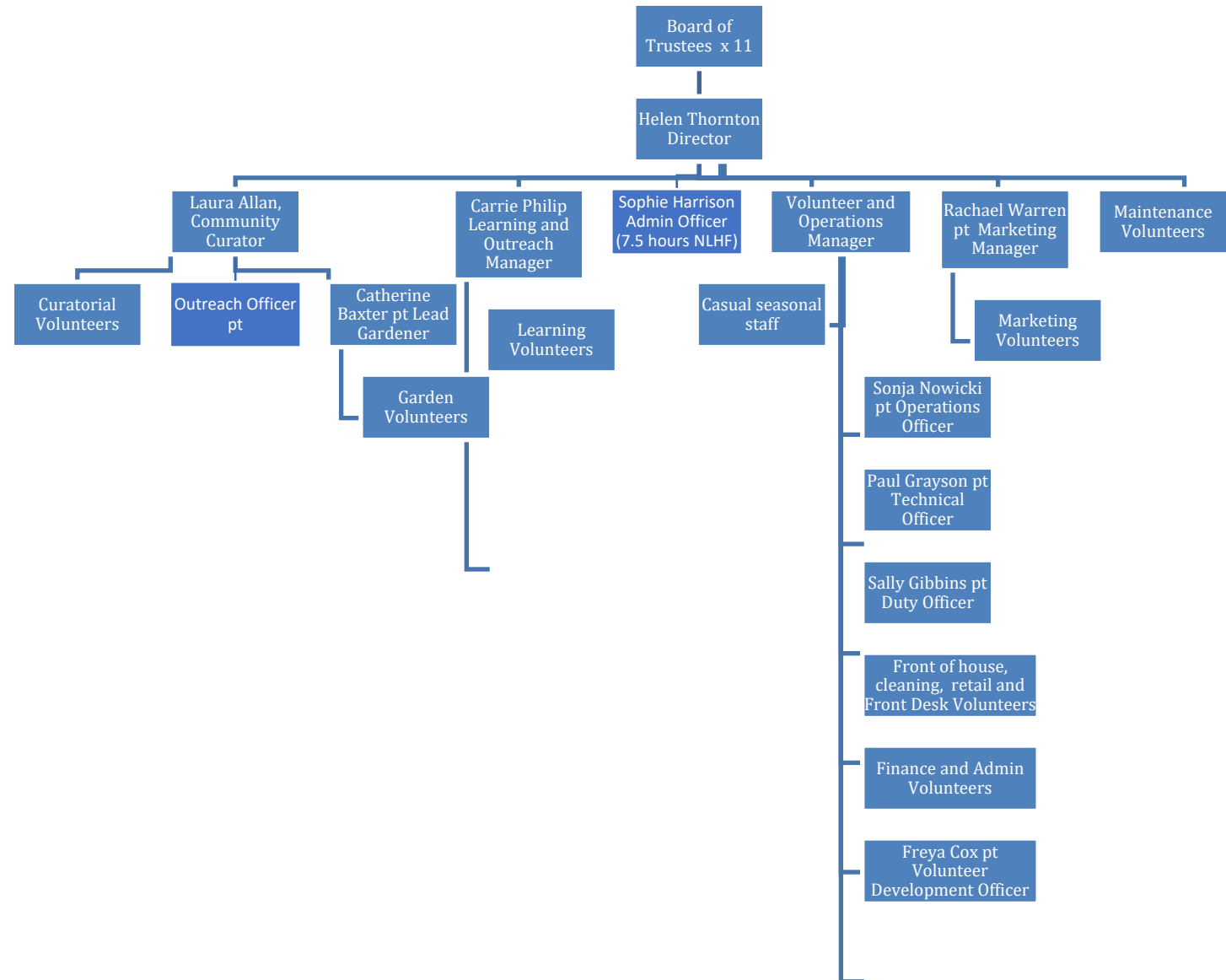
Break clause

11. Appendices

Project organisational chart.
RMT staff organisational chart.
Outline Programme
Outline Condition Survey
RCIS Scope of Services



APPENDIX G – Key responsibilities of RMT staff July 2021



Key responsibilities

Director ft

- Strategic direction
- Financial and performance management
- External relationships (ACE etc)

Volunteer and Operations Manager ft

- Management and development volunteers
- Visitor Services, access and facilities management
- Environmental Action Plan lead

Learning and Outreach Manager ft

- Learning Programme development
- Developing new approaches to learning including digital
- Manage Learning Volunteers

Community Curator ft

- Community Engagement
- Collections Management
- Manage Curatorial Volunteers

Marketing Manager pt

- Marketing and PR Strategy
- Social media and digital content

Lead Gardener pt

- Develop and manage three historic gardens
- Manage Garden Volunteers

Operations Officer pt

- Front line and administrative operations

- Income development

Volunteer Development Officer pt

- Support for volunteers with additional needs
- Mental Health and Wellbeing for all volunteer teams

Technical Officer pt

- Informational Technology hardware and software support

Learning Officer pt

- Delivery of learning sessions/digital to schools and other learners
- Programme administration

Outreach Officer pt

- Delivery of outreach sessions to community groups
- Community engagement

Duty Officer pt

- Front line customer services and rotas
- Visitor data

Project 22 11 16 RMT Fairer Fu
Date: Thu 05/01/23

Task Split Milestone Summary Project Summary Inactive Task Inactive Milestone Inactive Summary Manual Task Duration only Manual Summary Foldup Manual Summary Start only Finish only External Tasks External Milestone Deadline Progress Manual Progress

**MAIN BLOCK, RIPON
WORKHOUSE MUSEUM -**

OUTLINE CONDITION SURVEY



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2417/3

July 2021

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Appendix B - *Sharow View Statement of Significance May 2014*

I. Introduction

The former Ripon Union Workhouse is situated in the city of Ripon, North Yorkshire at NGR SE 3134 7155, off Allhallowgate. The Ripon Workhouse Museum is located within the former gatehouse block and Main Block, with a workhouse garden in the north-east corner of the site. The main block and the gatehouse are included on the List of Buildings of Special Architectural or Historic Interest as Grade II (refer to Statement of Significance in Appendix B for list entry description).

The Main Block was acquired by the Trust in 2017, with a HLF grant. At the time of the acquisition, the previous owners had not undertaken repairs to the external fabric for a number of years and therefore urgent repairs are now required to safeguard the historic building.

This report summarises the findings of previous condition reports, along with a brief visual inspection of the Main Block, attached kitchen block and Woodshed at the Ripon Workhouse, prepared by Woodhall Planning and Conservation on behalf of the Ripon Museums Trust, in January 2021.

This work was carried out to inform a feasibility study for Site and the preparation of a preliminary cost plan. As a result of this initial work, the scope of the NHLF grant application has been refined.

It should be noted that although the summary of condition includes the Woodshed, this does not form part of the proposed Capital Works. Recommendations for the scope of the repair and restoration work to be included in the NHLF grant are set out in Section 6.

2. Summary of previous reports

In 2007, Woodhall Planning and Conservation prepared a Conservation Management Plan for the Vagrant's Block and external features at Sharow View. At that date the Main Block was in separate ownership and therefore only an outline assessment of the Main Block was included in the report.

In 2011, various reports on the condition of the Main Block were carried out including:

- August 2011 Jacobs Engineering UK Ltd – roof and structure condition survey
- September 2011 Peter Cox Survey of roof timbers
- September 2011 Biker Contracts Ltd – Drainage CCTV survey

In 2014, prior to acquisition, the Trust commissioned a number of reports about the Main Block, including:

- J M Witherick and Associates carried out an Asset Condition Assessment of the Main Block (Sharow View).
- May 2014 – Woodhall Planning and Conservation – Statement of Significance of Sharow View (Main Block) – *refer to Appendix B*

April 2018 – Asbestos Re-inspection Survey by A1 Environmental Services Ltd.

These reports identified that extensive repairs were required to the fabric of the building and in particular:

- Roof: numerous broken and slipped slates, with extensive temporary and unsightly patch repairs to the inner slopes, defective sandstone ridges, defective stone cappings to parapets and verges. Re-roofing with underlay recommended and replacement of all slating battens. Treatment of roof timbers for common furniture beetle
- Brickwork and chimneys: defective mortar pointing. Chimneys leaning and out of plumb and need to be rebuilt
- Settlement of front elevation (*NB remedial works were undertaken to this part of the building prior to acquisition*)
- Defective rooflights in need of replacement
- Defective cast iron rainwater goods in need of replacement
- Repairs to windows
- Asbestos in floor tiles and stair nosings, fuse boards and joints in boiler room pipework

Since their acquisition in 2017, whilst the Trust has addressed some localised issues with water ingress with patch repairs to the lead gutters and roof and repairs to some of the windows, they have been unable to fund the extensive programme of re-roofing and external repairs.

Internally, they arrange for routine inspections of the M&E services. These inspections have highlighted the need to upgrade the services, including the fire alarm and heating system. The existing heating system is very inefficient and the boiler is very expensive to run and the heating engineer has identified that it is in urgent need of replacement.

In line with their environmental policy, the Trust is keen to improve the thermal performance of the building and to minimise their energy use and in particular fossil fuels wherever possible.

SECOND DRAFT

3. Outline Condition – Woodshed

Roof

Slipped slates. Numerous tangles

Parapet - open joints in coping.



East elevation

Some open joints at low level and odd at high level

One eroded brick to replace

Felt over lintol to replace. Check lintol

Rotation of brick on south-east corner

Clear vegetation growing at base of wall

Interior (east end)

Painted concrete floor

Ceiling boarded out between the ties of the trusses

Exposed brickwork painted with applied timber moulding to form a small cornice detail between the ties of the trusses

Electric heating and exposed painted conduits

Store 1

Ceiling underdrawn with plastic

Purlin spans East/west

Brickwork painted with paint flaking off in areas

Embedded horizontal timber at eaves level which has been limewashed on West wall

Exposed concrete floor limited access due to stored items

Store 2

Exposed rafters and purlins roof

Six rafters. slates with the remnants of some torching visible

Walls limewashed in a light yellow/brown colour and an exposed brick floor

Extensive efflorescence around window on south wall

Workshop

Inserted suspended ceiling with hatch in the centre

Chimney breast on South wall

generally limited inspection due to all of the stored material

Timber boarded floor exposed

Walls are painted evidence of cracking particularly on the east wall where timber is stored on brackets built into the wall

Paint flaking to expose red ochre below

High level vent in west wall

Vertical boarded timber doors in north wall. Flight holes in door and frame

Window with Perspex sheet over. Cill decayed internally. 1 broken pane

1 incorrect pane

North elevation

Blocked opening to store adjacent learning room - assume metal plate lintol.

Some corrosion evident and rust jacking in bed joints

Mortices and scar on brick, provide evidence of previous leanto structure

Louvred vent to learning room (roof void)

Some eroded bricks and open joints in 5 courses band approx 8 courses above ground level plus 4 bricks to piece in

Scar where yard wall taken down and straight joint

Slipped slates on hip to workshop

West elevation

Moss on slates and open joints in ridge tiles

Some open joints

Cracking at southern end and where yard wall taken down

South elevation - workshop

Cracking at east end

2 pintles from gate extant

Eroded bricks to replace and piece in at base

Rake out and repoint all

Reslate hip - numerous slipped and damaged slates

Raking cracking at east end - spreading?

East elevation - workshop

Numerous open joints

South elevation

Open joints at low level

Open joints to east of store 1 window

4. Outline Condition – Main Block

Exterior

General

Roof and high level masonry in poor condition. Water ingress through valley gutters. Eroded stone ridges. Moss on slates and verges. Slipped and damaged slates. Vegetation and open joints in copings. Eroded coping stones



Rainwater goods in poor condition

Extensive use of hard cement mortar, including cement render patch repairs in several locations.

Extensive soiling/blackening of stone dressings

Decay in timber window cills. Repairs and redecoration required to external doors and windows

Double gable to east:

Open joints and vegetation around valley gutter. Unusual projecting hopper detail but no apparent overflow provided

Extensive repointing required - open joints and hard cement mortar

Some eroded bricks to replace

First floor window - cill paintwork very poor. Decay in cill and base of frames and casements

Rainwater goods generally corroded - replace

Open joints in concrete flag margin and some re-levelling required

Master's House - East elevation

Decay in 3no. first floor windows

New cills required to 2no. ground floor windows

Eroded and open mortar joints in lower courses (GF cill and below)

South elevation

East extension – GF and FF windows decayed

Male east wing - repair 4no. FF windows. Rake out and repoint Nb crack at east end of elevation

Master's House - Cills to 3no. FF windows & 2no. GF windows decayed. Vegetation growing in stonework around entrance

Female wing - 3no. FF window cills decayed



Interior

Central block -Head of stair inner bead decayed. Plaster below poor. Ceiling cracked

Internal rainwater pipe

Woodchip on walls.

Stone steps with vinyl over (asbestos content).

Generally, modern (inserted) ceilings at first floor level

Cracks at high level to south of east stair (FF in Master's House)

Cracks and water penetration evident along FF corridor in east wing (below valley gutter)

Modern doors generally – some fire doors do not close properly

Fragment of historic wallpaper at FF level in SE corner of west wing

Poor acoustic separation between ground and first floors

Water ingress through windows

First floor areas generally in need of refurbishment and redecoration





Sun Room

Modern lightweight structure with mineral felt covered flat roof, timber cladding and large single glazed windows.

Designed as a covered link corridor between the Main Block and Infirmary it has very poor thermal performance.

The windows have low cill heights and the glazing is not safety glass and due to the large size, there is some flex in the glazing

SECOND DRAFT

5. Outline Condition – Kitchen Block

Roof: uneven ridge and slopes, with defection evident between trusses. Eroded bedding below ridges. Moss between slates. Slipped and damaged slates. Open joints and vegetation in copings. Eroded copings. 2no. glass slates on east elevation to be retained
Timber ridge ventilator decayed



Hard cement mortar, with open and eroded joints and bricks
Efflorescence on chimney breast
Rainwater goods in very poor condition



Decay in timber windows
If basement to be used, restore lightwells to 5no. basement windows and provide 5no. new timber windows. Provide drainage at base with metal grilles over lightwells. Internally, allow

for opening up floor in the area of the basement stair and for reinstating stone steps to basement, with lockable floor hatch over.

If boiler house to be relocated, remove low level vent and infill opening with brickwork.

Replace high level vent with new 2-light timber framed double glazed casement.

Remove climber and trellis on east elevation and point up voids where removed

Issues with water ingress to interior, around chimney

Damage to quarry tile floor



6. Recommendations for Capital Works to be included in NHLF application

External

- Allow for re-roofing Main Block, Kitchen block, sorting and salvaging slates for re-use. Allow say 50% replacement slates and ridges. Provide insulation, breathable membrane and new rainwater goods (cast iron gutters, downpipes and hoppers). New lead valleys including timber decking to gutter, lead flashings etc
- Lift and rebed stone verges allowing for 10% replacement.
- Check condition of stone finials to south gables. Provide new stainless steel insect mesh to louvred openings in gables and ventilators
- Chimneys - repoint stacks 100%. Check chimney pots and replace mortar haunchings
- Repair and redecorate all external joinery (windows, doors, fascias, barge boards, ventilators etc)
- Redecorate metal grilles, rainwater goods and hoppers, soil vent pipes
- Remove redundant fixtures and fittings
- Consider light/gentle cleaning of stone dressings
- Allow for some replacement of eroded stone dressings
- Remove vegetation growing at base of all buildings
- Assume 100% rake out and repoint with lime mortar to all elevations
- Allow for removing cementitious mortar infill and cutting out eroded bricks and for piecing in approx. 200no. bricks in various areas – where mortar infill or eroded bricks removed
- Replace ironmongery to all external doors and provide new suited locks. Allow for repairs to doors – splice repairs to base of door frames etc
- Provide new insulated flat roof covering and rainwater goods, insulated timber cladding and new timber framed double glazed windows to the Sun Room
- Improve access to first floor with construction of extension to accommodate lift

Internal

- Take down modern suspended ceilings above former dormitories (FF West Wing). Allow for repairs to lath and plaster ceiling above. Allow for joinery repairs to roof trusses.
- Allow for repairs to cracks in FF ceilings in various locations
- Allow for upgrading the acoustic separation between ground and first floor areas
- Remove inserted partitions and ceilings to suit restored spaces
- Allow for some plaster repairs to walls
- Provide metal framed secondary glazing set in timber sub frames
- Allow for redecoration or touching up of decorations to main visitor areas.
- Removal of asbestos floor tiles, stair nosings etc and provision of new floor coverings,
- Quarry tile floor in kitchen and scullery and parquet floors in master's quarters to be retained and made good where later partitions removed
- Allow for removal of asphalt covering in GF room to north of east stair (*former Grocery Store/Pantry*)– problem with water rising and ponding on floor. Investigate and allow for new concrete floor with quarry tile finish?
- Review passive fire protection and upgrade as necessary, including fire doors, means of escape and service penetrations
- Dispose of existing gas boilers and allow for new ground source or air source heat pump, with plant located in cellar below kitchen block

- New M&E installations throughout Main Block (including kitchen block and sun room), to suit new heat pump. Heating and security systems to be zoned. New fire alarm system, security system, Cat 6 data infrastructure.
- Relocate meters and consumers units from GF room to Store /cellar (below kitchen block)

External Works

- Master's Garden: take down brick pier at south end of existing east wall, reclaiming bricks for re-use. Extend wall southwards, detail to match existing and with new stone capping. New brick walls as shown on plan (assume 1.8m high, including stone capping). Allow for raking out and repointing retained section of wall in lime mortar

Appendix A – *Reference Plans (existing and proposed)*

SECOND DRAFT

SECOND DRAFT

England and Wales

Quantity Surveyor Services

2019 edition



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For use with the RICS Standard or RICS Short Forms of Consultant's Appointment

Additional notes

- These Services should be completed by inserting a 'tick' in the box next to the Service to be provided. For further information please refer to the RICS Standard or RICS Short Form of Consultant's Appointment explanatory notes.
- All other Services that are not ticked shall be deemed to be Additional Services under the terms of this Appointment.
- Any bespoke Additional Services agreed between the Client and the Consultant should be inserted in Section 6.
- A schedule of 'typical' meetings is included with these Services in Appendix A. Completion of this schedule is also recommended.
- It is recommended the parties read the *RICS QS and Construction Standards*.

1 Construction services – all contracts

1.1 General

- ☒ 1.1.1 Attend Client, design, Project, Site and other meetings as provided under this Appointment.
- ☒ 1.1.2 Prepare regular/monthly cost reports. Advise the Client of any decisions required and obtain authorisation.
- ☒ 1.1.3 Liaise with the Client and the Professional Team to determine the Client's requirements and to develop the Client's Brief.
- ☒ 1.1.4 For any type of measurement service, measurement should be in accordance with the relevant *International Property Measurement Standard*.
- ☒ 1.1.5 Classify the construction costs in accordance with *International Construction Measurement Standards*.

1.2 Enabling works

- ☒ 1.2.1 Liaise with the Client and the Professional Team to determine the Client's initial requirements and to develop the Client's Brief. Prepare recommendations for the Client's approval.
- ☒ 1.2.2 Advise the Client on demolition, strip-out, site investigation, diversionary and enabling works contracts, decanting and any other works required to enable the Project to proceed.
- ☒ 1.2.3 Liaise with the Professional Team and procure demolition, strip-out, site investigation, diversionary and enabling works contracts required to enable the Project to proceed.

1.3 Health and safety

- ☒ 1.3.1 Liaise with the Professional Team and advise the Client of its obligations under the CDM Regulations.
- ☒ 1.3.2 Comply with the CDM Regulations insofar as they relate to this Appointment.

1.4 Project costs

- ☒ 1.4.1 Advise on the cost of the Project. Advise on the cost of alternative design and construction options.
- ☒ 1.4.2 Advise on alternative procurement options.
- ☒ 1.4.3 Visit the Site. Advise the Client on any factors likely to affect cost, time or method of implementation.
- ☒ 1.4.4 Prepare an initial budget estimate to test feasibility proposals.
- ☒ 1.4.5 Advise the Client on the likely effect of market conditions.
- ☒ 1.4.6 Prepare, maintain and develop a cost plan and cash flow forecast.
- ☒ 1.4.7 Advise on the cost of the Professional Team's proposals periodically as the design proceeds, including effects of site usage, shape of buildings, alternative forms of design, procurement and construction, etc. Advise on any cost variances to the allowances contained in the cost plan.
- ☒ 1.4.8 Advise the Client on specialist services, including consultants, contractors, subcontractors and suppliers, required in connection with the Project.
- ☐ 1.4.9 Prepare life-cycle cost studies and estimates of annual running costs.

1.5 Contracts related advice

- ☒ 1.5.1 Prior to starting works on-site, confirm the scope of the Building Contract(s) to the Client and advise on additional works required by third parties.
- ☒ 1.5.2 Liaise with the Client's insurance advisers and advise on construction related insurances (excluding the administration of claims).
- ☒ 1.5.3 Liaise with the Client's legal advisers and advise on warranties/third party rights, etc.

- ☒ 1.5.4 Liaise with the Client's legal advisers and advise on bonds for performance and other purposes.
- ☒ 1.5.5 Liaise with the Client's legal advisers and advise on the use and/or amendment of construction industry standard forms of Building Contract or contribute to drafting of particular Client requirements.
- ☒ 1.5.6 Advise on the rights and obligations of the parties to the Building Contract.

1.6 Tendering and procurement services

- ☒ 1.6.1 Advise on tendering and contractual procurement options. Prepare recommendations for the Client's approval.
- ☒ 1.6.2 Obtain tender drawings and specifications from the Client and the Professional Team.
- ☒ 1.6.3 Liaise with the Client and the Professional Team and prepare tender documentation.
- ☒ 1.6.4 Prepare bills of quantities for inclusion in tender documents in accordance with NRM 2 (excludes MEP bills of quantities).
- ☐ 1.6.5 Prepare schedules of rates, activity schedules or other pricing documents, for inclusion in tender documents (excludes MEP bills of quantities).
- ☒ 1.6.6 Advise on suitable tenderers for the works required on the Project. Prepare recommendations for the Client's approval.
- ☒ 1.6.7 Investigate prospective tenderers for the Building Contract(s) or subcontract(s) and advise the Client on their financial status and technical competence. Prepare recommendations for the Client's approval.
- ☒ 1.6.8 Attend and participate in pre- and post-tender interviews of prospective tenderers for the works required on the Project.
- ☒ 1.6.9 Arrange delivery of tender documents to selected tenderers for the works required on the Project.
- ☒ 1.6.10 Check tender submissions for errors, omissions, exclusions, qualifications, inconsistencies, etc.
- ☒ 1.6.11 Liaise with the Professional Team and advise on errors, omissions, exclusions, qualifications and inconsistencies between the tender documents and the tenders received. Prepare recommendations for the Client's approval.
- ☒ 1.6.12 Comment on the tenderers' design and construction programmes and method statements.
- ☒ 1.6.13 Liaise with the Professional Team and prepare a tender report. Prepare recommendations for the Client's approval.

- ☒ 1.6.14 Conduct negotiations with tenderers. Prepare documentation to confirm adjustments to the tender sums. Prepare recommendations for the Client's approval.
- ☒ 1.6.15 Liaise with the Client and the Professional Team and advise on methods of progressing design and/or construction works prior to the execution of the Building Contract.
- ☒ 1.6.16 Obtain confirmation from the Contractor that required Contractor or subcontractor insurances are in place prior to commencement of works on the Site.
- ☒ 1.6.17 Obtain contract drawings and specifications from the Client and the Professional Team. Liaise with the Client's legal advisers, prepare the contract documents and deliver to the Client and the Contractor for completion.

1.7 Construction phase services

- ☒ 1.7.1 Develop and maintain the Project cost plan and the Project cash flow forecast for the duration of the Project.
- ☒ 1.7.2 Visit the Site periodically and assess the progress of the Project for interim payment purposes.
- ☒ 1.7.3 Advise on the cost of variations to the works prior to the issue of instructions under the Building Contract.
- ☒ 1.7.4 Agree the cost of instructions, excluding loss and expense claims, issued under the Building Contract.
- ☒ 1.7.5 Advise on the rights and obligations of the parties to the Building Contract.
- ☒ 1.7.6 Prepare recommendations for interim payments to the Contractor and the release of retention funds.
- ☒ 1.7.7 Advise the Client in regard to payment notices, pay less notices and other similar notices of default.
- ☒ 1.7.8 Prepare for issue payment notices, pay less notices and other similar notices of default.
- ☒ 1.7.9 Prepare the final account or similar financial statement. Facilitate agreement to the final account or similar financial statement from the parties to the Building Contract. For the purposes of this clause the final account or similar financial statement excludes the assessment of loss and expense claims.
- ☒ 1.7.10 Where relevant, prepare recommendations for the payment of liquidated damages by the Contractor.

1.8 Additional construction phase services – cost reimbursable/management/construction management/target contracts

- ☒ 1.8.1 Liaise with the Client's legal advisers and advise on use and/or amendment of bespoke forms of contract or contribute to drafting of particular Client requirements.
- ☐ 1.8.2 Obtain agreement from the Contractor(s) to the cost plan.
- ☐ 1.8.3 Agree a breakdown of the cost plan with the Contractor(s) consistent with the work package procurement strategy.
- ☐ 1.8.4 Agree the Contractor(s)'s entitlement to recovery of preliminaries, overheads and profit.
- ☐ 1.8.5 Liaise with the Professional Team and lead the negotiation of a target cost or guaranteed maximum price for the Project.
- ☒ 1.8.6 Assist the Contractor in the preparation of work package tender and contract documents.
- ☐ 1.8.7 Verification of Contractor's cost by checking invoices and other evidence.
- ☒ 1.8.8 Price the work package tender documents to provide a benchmark for assessing tender returns.
- ☐ 1.8.9 Review work package tender returns. Prepare recommendations for the Client's approval.
- ☐ 1.8.10 Advise on the cost of variations, excluding loss and expense claims, proposed by the Contractor prior to the issue of instructions under the Building Contract or work package contract.
- ☐ 1.8.11 Develop and maintain the cost plan and cash flow forecast as work packages are let.
- ☐ 1.8.12 Check interim valuations and final accounts from the Contractor, work package contractors and suppliers.
- ☐ 1.8.13 Advise on expenditure not recoverable under the terms of the management contract and/or the work package contracts.
- ☐ 1.8.14 Monitor the Project using Earned Value Analysis.

1.9 Additional construction phase services – design and build contracts

- ☐ 1.9.1 Liaise with the Client and the Professional Team and coordinate the preparation of the employer's requirements.
- ☐ 1.9.2 Liaise with the Professional Team and advise on errors, omissions, exclusions, qualifications and inconsistencies between the employer's requirements and the Contractor's proposals. Prepare recommendations for the Client's approval.

- ☒ 1.9.3 Liaise with the Professional Team and prepare cost studies to assess alternative Contractor's proposals. Prepare recommendations for the Client's approval.
- ☒ 1.9.4 Liaise with the Professional Team and assist with specialist enquiries to assess alternative Contractor's proposals. Prepare recommendations for the Client's approval.
- ☒ 1.9.5 Liaise with the Professional Team and conduct negotiations with the Contractor. Obtain documentation from the Professional Team to confirm the agreed design and/or performance specifications. Prepare recommendations for the Client's approval.
- ☐ 1.9.6 Advise on the cost of variations, excluding loss and expense claims, proposed by the Contractor prior to the issue of instructions under the Building Contract.
- ☐ 1.9.7 Agree the cost of instructions, excluding loss and expense claims, proposed by the Contractor under the Building Contract.

1.10 Additional construction phase services – provision of services where a contractor is the Client

- ☐ 1.10.1 Obtain subcontract drawings and specifications from the Client. Liaise with the Client's commercial team, prepare the subcontract documents and deliver to the subcontractor(s) for completion.
- ☐ 1.10.2 Advise the Client on the cost of variations to the works prior to the issue of instructions under subcontracts.
- ☐ 1.10.3 Agree the cost of instructions, excluding loss and expense claims, issued under subcontracts.
- ☐ 1.10.4 Prepare recommendations to the Client for interim payments to subcontractors and the release of retention funds.
- ☐ 1.10.5 Prepare the final account or similar financial statement. Facilitate agreement to the final account or similar financial statement from the parties to the subcontract. For the purposes of this clause the final account or similar financial statement excludes the assessment of loss and expense claims.
- ☐ 1.10.6 Where relevant prepare recommendations to the Client for the payment of liquidated and ascertained damages by subcontractors.
- ☐ 1.10.7 Advise the Client on the rights and obligations of the parties to the subcontract(s).
- ☐ 1.10.8 Advise on the subcontractors' entitlement to extensions of time. Analyse and report on the subcontractors' application(s) for extensions of time. Prepare recommendations for the Client's approval.

2 Construction phase services – supplementary services

2.1 General

- ☐ 2.1.1 Provide services for the Client's and/or any third party's fitting-out or direct works contracts.
- ☐ 2.1.2 Prepare bills of quantities for mechanical and electrical services.
- ☐ 2.1.3 Price bills of quantities to provide an estimate for comparison with tenders.
- ☐ 2.1.4 Prepare a cost analysis based on agreed format or special requirements.
- ☒ 2.1.5 Prepare a cost analysis of the final account.
- ☒ 2.1.6 Facilitate, set up and manage value engineering exercises.
- ☐ 2.1.7 Facilitate, set up and manage early warning and risk reduction meetings.
- ☒ 2.1.8 Attend and contribute to early warning and risk reduction meetings.
- ☐ 2.1.9 Facilitate, set up and manage a two-stage tendering process.
- ☐ 2.1.10 Facilitate, set up and manage target cost and/or guaranteed maximum price contracts.
- ☐ 2.1.11 Facilitate, set up and manage partnering and/or collaborative working contracts.
- ☐ 2.1.12 Benchmarking of contracts and subcontracts.
- ☐ 2.1.13 Provide specialist procedural advice to comply with EU Regulations and/or other legislation.
- ☐ 2.1.14 Carry out off-site inspections of subcontractors' and suppliers' premises for interim payment purposes.
- ☐ 2.1.15 Monitor the Project using Earned Value Analysis.

2.2 Contractual

- ☐ 2.2.1 Provide specialist quantity surveying advice on the interpretation of contracts and contractual clauses.
- ☐ 2.2.2 Liaise with the Client's legal advisers and advise on the use and/or amendment of bespoke forms of contract or contribute to the drafting of particular Client requirements.

- ☒ 2.2.3 Advise on the Contractor's entitlement to extensions of time. Analyse and report on the Contractor's application(s) for extensions of time. Prepare recommendations for the Client's approval.
- ☒ 2.2.4 Advise on the cost and contractual consequences arising from an acceleration instruction.
- ☒ 2.2.5 Advise on the Contractor's entitlement to loss and expense. Analyse and report on the Contractor's loss and expense claim(s). Prepare recommendations for the Client's approval.
- ☐ 2.2.6 Prepare documentation and/or provide advice to support adjudication proceedings. Attend adjudication proceedings.
- ☐ 2.2.7 Prepare documentation and/or provide advice to support mediation proceedings. Attend mediation proceedings.
- ☐ 2.2.8 Prepare documentation and/or provide advice to support arbitration and/or litigation proceedings. Attend arbitration and/or litigation proceedings.
- ☐ 2.2.9 Advise the Client on the selection, terms of appointment and fee structures for the Professional Team.

3 Non-construction services

- ☐ 3.1 Provide services for the Client's and/or any third party's organisational move to new premises.
- ☐ 3.2 Monitor key performance indicators.
- ☐ 3.3 Provide estimates of replacement costs for insurance purposes.
- ☐ 3.4 Provide services in connection with insurance claims.
- ☐ 3.5 Facilitate, set up and manage 'lessons learned' or other workshops.
- ☐ 3.6 Act as the Client's partnering adviser.
- ☐ 3.7 Set up and maintain a secure project and document management website that will store all relevant correspondence and documents and which is to be accessed and used by the Client, the Professional Team and the Contractor.
- ☐ 3.8 Set up, maintain and operate an e-tendering portal on behalf of the Client.

4 Financial support services

- ☐ 4.1 Advise on the financial implications of developing different sites.
- ☒ 4.2 Advise on the preparation of development appraisals.
- ☐ 4.3 Advise on the cost implications of alternative development programmes.
- ☐ 4.4 Prepare sustainability cost studies.
- ☒ 4.5 Prepare life-cycle cost studies and estimates of annual running costs.
- ☐ 4.6 Advise on and evaluate capital tax allowances, grants or other financial assistance available in respect of the Project.
- ☐ 4.7 Prepare applications for capital tax allowances, grants or other financial assistance available in respect of the Project.
- ☐ 4.8 Advise on VAT payable in respect of the Project. Provide a breakdown of the cost plan, interim valuations and final account or similar financial statement for VAT purposes.
- ☐ 4.9 Prepare capitalisation of construction costs for the purpose of preparing an asset register.

5 Building information modelling (BIM)

- ☐ 5.1 Independently check and verify the integrity and accuracy of the BIM 5D cost model.
- ☐ 5.2 Establish and input contemporary rates into the BIM cost model.
- ☐ 5.3 Prepare and create a 5D cost estimate of the Project.
- ☐ 5.4 Prepare and create a 5D cost plan of the Project in accordance with NRM 1.
- ☐ 5.5 Check and where necessary adjust BIM-generated measurements.

6 Bespoke Additional Services

- ☐ 6.1 Enter or attach bespoke Additional Services agreed with the Client.

Appendix A: Schedule of meetings to be attended by the Consultant

1 Client meetings

Attendance: Partner ☐ Director ☐ Associate ☒ Project surveyor ☒
Other ☐ (please specify) _____

Frequency: Daily ☐ Weekly ☐ Monthly ☐ Quarterly ☒
No attendance required ☐ Other ☐

Please specify requirements: _____

2 Professional Team meetings

Attendance: Partner ☐ Director ☐ Associate ☐ Project surveyor ☒
Other ☐ (please specify) _____

Frequency: Daily ☐ Weekly ☐ Monthly ☒ Quarterly ☐
No attendance required ☐ Other ☐

Please specify requirements: _____

3 Project team meetings

Attendance: Partner ☐ Director ☐ Associate ☐ Project surveyor ☒
Other ☐ (please specify) _____

Frequency: Daily ☐ Weekly ☐ Monthly ☒ Quarterly ☐
No attendance required ☐ Other ☐

Please specify requirements: _____

4 Site meetings

Attendance: Partner ☐ Director ☐ Associate ☐ Project surveyor ☒
 Other ☐ (please specify) _____

Frequency: Daily ☐ Weekly ☐ Monthly ☒ Quarterly ☐
 No attendance required ☐ Other ☐

Please specify requirements: _____

5 (Other) meetings

Name of meeting: Miscellaneous

Attendance: Partner ☐ Director ☐ Associate ☐ Project surveyor ☒
 Other ☐ (please specify) _____

(Specify required attendees) _____

Frequency: Daily ☐ Weekly ☐ Monthly ☐ Quarterly ☐
 No attendance required ☐ Other ☐

Please specify requirements: To be determined in response to project needs. No more than 5 per year.

Appendix B: Glossary of terms

5D	BIM model that incorporates three spatial dimensions (length, width, height or thickness), scheduling information, and cost related information.
Earned Value Analysis	Method of measuring a property's development progress at any given point in time, forecasting its completion date and final cost, and analysing variances in the property's development programme and budget, as the property's development proceeds.
NRM 1	<i>RICS New Rules of Measurement: Order of Cost Estimating and Cost Planning for Capital Building Works.</i>
NRM 2	<i>RICS New Rules of Measurement: Detailed Measurement for Building Works.</i>

The following additional definitions shall apply where the RICS Short Form of Consultant's Appointment is used:

Building Contract	The contract or contracts between the Client and the Contractor for the construction of the Project, a copy of which (or a copy of relevant extracts of which) the Client provides to the Consultant.
Client's Brief	The brief provided by the Client identifying the Client's requirements in relation to the Project as such requirements may, in accordance with the Client's instructions, be amended from time to time with the Consultant's agreement (which agreement is not to be unreasonably withheld or delayed).
Contractor	The contractor or contractors that the Client appoints under the Building Contract.
Site	The site on which the Project is being undertaken.



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