Refurbishment of the Conference Centre of the Royal College of Physicians of Edinburgh

Project Management Services Procurement: Project Outline
Summary of Project

1. Project Name: The refurbishment of the Queen Mother Conference Centre and upgrade of reception area and disabled access facilities.
2. Project Coordinator: Nigel Owen: n.owen@rcpe.ac.uk
3. Construction cost (excluding design fees and VAT): £4.0m approx
4. Main Contract type: TBC
5. Anticipated start on site date: Nov 2015
6. Anticipated construction length: 12 months
7. Award criteria at RFT stage: 70% quality / 30% cost

The Project Brief

The Royal College of Physicians of Edinburgh (RCPE) require the services of a Project Manager to assist them in the delivery of the design and construction of a major refurbishment of the properties at 9 to 13 Queen Street in Edinburgh.

As a long-standing Edinburgh-based institution RCPE is committed to remaining in its historic ‘grade A’ listed buildings in Queen Street. It is therefore focused on improving its existing city centre facilities to become a world-class venue fit for the future and to consolidate its position in Edinburgh as a leading provider of educational event facilities to medical professionals and commercial clients.

In 2013 RCPE identified the need to undertake the following improvements to their property to achieve this end;

- Refurbishment of the existing conference centre; auditorium, concourse, lavatories, storage and catering spaces.
- Develop a new entrance and reception space for the conference centre.
- Improve circulation around the building
- Resolution of existing discriminatory disabled access

To assist RCPE in understanding how these improvements could be achieved, it appointed Michael Laird Architects to prepare a feasibility study. This study was completed in April 2014 and includes design proposals with a project programme and outline costs. The feasibility report has been sanctioned by RCPE as a good reflection of their aspirations and the governing council of the RCPE has given approval for the project to proceed to the next stage; appointment of the Project Manager. An abbreviated version of the feasibility report will be issued with the PQQ.

The governance procedures required by RCPE, under its charitable status, means that a transparent process for the procurement of consultants and contractors must be evident. For this reason RCPE intend to tender for all services. Although the contents of the feasibility report were welcomed by RCPE the design proposals are only accepted as an indication of what is possible and affordable. RCPE would be open to further design proposals provided that best value can be shown.
Project Manager Services

RCPE (Client) requires professional support to manage a construction project of this scale and complexity. For this reason they have decided to appoint an independent Project Manager to provide the necessary expertise to ensure the delivery of a successful project in terms of quality, cost, programme, risk and good governance. The Project Manager will have a direct relationship with Nigel Owen, RCPE’s designated point of contact for the project. However, the Project Manager will also have regular liaison with the project steering group who represent the RCPE Council.

The RCPE place a significant value on the quality of the appointed Project Manager with particular emphasis on their commitment and passion shown to the project, ability to engender good chemistry between teams and stakeholders and experience in developing and managing effective communication and project protocols.

The scope of services document for the prospective Project Manager is included in Appendix A.

Overview of the Procurement Exercise

This appointment is for a Project Manager, who will be required to have the necessary quality and experience for this type of project.

Key Programme Dates:

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PQQ advert in National Press</td>
<td>Wednesday 4th June 2014</td>
</tr>
<tr>
<td>Last date for PQQ registration</td>
<td>5.00pm Friday 13th June 2014</td>
</tr>
<tr>
<td>PQQ Submission date</td>
<td>12.00 noon Wednesday 18th June 2014</td>
</tr>
<tr>
<td>Selection of shortlist</td>
<td>Friday 27th June 2014</td>
</tr>
<tr>
<td>Issue of Request for Tender (RFT)</td>
<td>Friday 27th June 2014</td>
</tr>
<tr>
<td>RFT Submission date</td>
<td>12.00 noon Friday 18th July 2014</td>
</tr>
<tr>
<td>Project Manager Interviews</td>
<td>w/c 28th July</td>
</tr>
<tr>
<td>Selection of Project Manager</td>
<td>w/c 4th August 2014</td>
</tr>
</tbody>
</table>
APPENDIX A

Project Manager Scope of Services
The following schedule of services describes what is expected of the project Manager throughout the project:

**Schedule of Services**

1. Analysis of feasibility study
2. Funding, grants etc.
3. Legal services
4. Consultant appointments
5. Brief, design and quality control
6. Reporting and meetings
7. Programming
8. Capital budgeting
9. Construction economics and financial management
10. Cash flow
11. Local authority and planning approvals
12. Contract procedures
13. Contract management
14. Building management, commissioning and maintenance

---

1. **Analysis of feasibility study**

A feasibility study was produced by Michael Laird Architects in conjunction with; RSP, David Narro and Thomas and Adamson. The Project Manager shall analyse this report and recommend its approval or modification before moving to the next stage.

2. **Funding, Grants etc**

2.1 Liaise with RCPE (the Client) on proposed funding of project and advise on cash flows through duration of overall project.

2.2 Assist the Client on investigation of sources and methods of finance, grants etc.

3. **Legal Services**

3.1 Arrange for all contracts and consultant appointments with the Client’s legal advisors.

4. **Consultant Appointments**

4.1 Advise the Client on the need for and make recommendations for the appointment of all other consultants by the Client.

4.2 Advise the Client on terms of consultant appointments and fee structures. Check that consultant’s responsibilities and information production are clearly stated. Advise on the need for duty of care warranties.

4.3 Organise procurement process for all consultants.

4.4 Advise the Client to check professional indemnity insurances of consultants, and arrange any necessary further checks.

4.5 Advise the Client on the need for and appointment of a clerk of works and other site supervisory staff.
4.6 Monitor the performance of consultants, clerk of works and contractors in the performance of their duties and the discharge of their responsibilities.

5. Brief, design and quality control

5.1 Co-ordinate with the Client and consultants the preparation of the design brief. Amplify the design brief as necessary during design development. Any changes to the brief must be tracked and client authorisation obtained. Issue to consultants.

5.2 Establish the responsibilities of consultants, contractors and sub-contractors resolving any gaps or overlaps in scopes of services.

5.3 Report consultant design proposals to Client at key gateways within the programme.

5.4 Report preferred components, drawings and specifications prepared by consultants to the Client and obtain approval. Arrange amendments, if required, and submit final proposals to Client for approval.

5.4 Check that consultants review buildability and technical design of proposals with specialist contractors.

5.5 Although consultants will retain full design responsibility for their scope of services the PM shall establish procedures for checking that the consultants’ designs conform to the project brief.

5.6 In conjunction with consultants, advise on the need for quality assurance schemes, defects insurance and product guarantees.

5.7 Visit site during construction phase at least once per fortnight to ascertain compliance of contractor with construction information

6. Reporting and Meetings

6.1 Create Project Execution Plan for the project. This will record names of all key personnel and define the processes and communication needed to create a successful project.

6.2 Establish meetings structure. Lay down procedure for convening, chairing, attendance, function, frequency and responsibility for recording of meetings and circulation of information. Monitor communications and distribution of information.

6.3 Check appropriate information is provided to the Client. Notify the Client of decisions required from them.

6.4 Agree reporting and recording procedures with consultants.

6.5 Convene and chair all principal project meetings.

7. Programming

7.1 In conjunction with consultants, prepare and maintain a master programme from concept to completion to record principal activities and identify critical dates. Verify and incorporate consultants’ programmes for production of detailed design information. Monitor progress.

7.2 Check that applications for statutory consents, government grants etc are submitted in accordance with the master programme.

7.3 Advise the Client of changes, recommend appropriate action and obtain authorisation.
7.4 Check, in conjunction with the design consultants, the contractors’ programme; seek clarification of contractors’ programme proposals if necessary, and incorporate these into master programme.

8. Capital Budgeting

8.1 In conjunction with the consultants, manage the preparation and maintenance of a master cost plan. Advise the Client of any alterations required and obtain authorisation for changes.


9.1 Organise the consultants to provide advice on commissioning, capital and the life cycle cost studies of alternative designs and materials. Ensure that client is advised on energy budgeting. Arrange appropriate financial procedures for risk assessment and for tax provision.

9.2 Advise the Client on appropriate procedures for dealing with insurance claims and agree any changes required to consultants’ fee arrangements generated by them.

9.3 Check that the consultants are providing adequate and timely information for the preparation of tender documentation.

9.4 Obtain Client authorisation for costs of variations when limit of authority is exceeded and check that costs are being agreed.

9.5 Report to the Client at regular intervals giving forecast of final costs, including costs of variations and the cost implications of extensions of time and forecast completion dates.

9.6 Create ‘Change Control System’ for implementation of the project to control; cost, quality and programme. Advise on when this system is to be commenced.

9.7 Check that consultants prepare regular valuations and payment certificates of the contractors’ works valued in accordance with the building contract. Check and recommend payment of Client’s copies of certificates. Check that valuations and certificates are correctly circulated.

9.8 Check, in conjunction with consultants, fees for statutory approvals and arrange payments.

9.9 Administer the contract.

9.10 Check and recommend consultants’ applications for payment.

9.11 Check and recommend all other invoices related to the development.

9.12 Check that consultants prepare final accounts and agree settlements.

9.13 Arrange for the Client to obtain advice on taxation implications.

10. Cash Flow

10.1 Manage the consultants to ensure effective preparation and maintenance of cash flow forecasts and statements for monitoring project expenditure.

10.2 Monitor all payments made and check against cash flow. Check Client makes payment within the stipulated time.
11. Local Authority and Planning Approvals

11.1 Co-ordinate and support negotiations with Planning authorities.

11.2 Check with the Architect the form and content of Planning applications. Progress the Planning process and arrange that the project team carries out a check of all approval/refusal documents. Create tracking document to manage any conditions attached to the Planning consent. Manage the resolution of these conditions.

11.3 Check with the consultants which other statutory approvals are required and that applications for approval are submitted. Check that consultants apply for amendments to statutory approvals when required.

11.4 Check that the consultants obtain clearance from Fire Officers.

11.5 The terms ‘Pre-Construction Information’, ‘Health and Safety File’, ‘CDM Co-ordinator’ and ‘Principal Contractor’ are as defined in The Construction (Design and Management) Regulations 1994 – ‘the CDM Regulations’. Advise the Client on their obligations under the CDM Regulations and that guidance is available from the Health and Safety Executive. Advise the Client on the requirements of the CDM Regulations in relation to the appointment of the CDM Co-ordinator, designers and the principal contractor. Following their respective appointment, monitor their compliance and that of the Client, or the Client’s agent where appointed, with the obligations imposed by the CDM Regulations in each of them. Inform the relevant appointee and the Client of any perceived non-compliance. Check the distribution of the Pre-Construction Information document and Health and Safety File.

12. Contract Procedures

12.1 Decide with assistance from consultants the selection and method of appointment of preferred/nominated sub-contractors and agree extent of design and specifications to be included in tender documents. Advise the Client accordingly.

12.2 Decide with assistance from consultants procurement procedure for selection of contractors. In liaison with legal advisors decide on type and form of contract. Monitor consultants in the preparation and assembly of tender documents. With the consultants, check the form and content.

12.3 With assistance from the consultants, prepare a list of tenderers, conduct selection procedures, if required, and obtain approval.

12.4 Arrange with consultants tender analysis; obtain clarification of ambiguities and prepare tender report. If necessary, arrange interview of tenderers. Prepare tender award recommendation and obtain instructions.

12.5 Co-ordinate the preparation of contract documents. Arrange for preparation of contractor’s duty of care warranty if required. Arrange signatures of parties to the contract.

12.6 Arrange for the contractor’s insurance certificate and renewal of insurance at renewal dates to be checked.

13. Contract Management

13.1 Arrange for Client to place order for long delivery components.
13.2 Advise Client of any works to be carried out under separate direct contract.

13.3 Co-ordinate the consultants using reasonable endeavours to secure the provision of information to contractors in an appropriate timescale.

13.4 Check that consultants are providing adequate supervision in accordance with their terms of appointment and undertake regular site inspections.

14. Building Management, Commissioning and Maintenance

14.1 Liaise with Client/Agents on practical management, maintenance programmes, provision of maintenance staff, and state of services pending occupation.

14.2 With assistance from consultants and contractors, arrange handover after operational tests and full commissioning of services.

14.3 Liaise with Client/agent/consultants on commissioning and equipping programmes. Check that the Health and Safety File is delivered to the Client by the CDMC, and to the extent not included in the document arrange for contractors’ and consultants’ maintenance and cleaning information, maintenance manuals, test certificates, guarantees, operating instructions, ‘as-built’ drawings and ‘as installed’ diagrams to be forwarded to the Client.