

TERM PARTNERING CONTRACT

NORTH AREA LOT 2

PROJECT EXECUTION PLAN

**X115 Hallfield Estate Phase 3
Refurbishment Works**

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1.0 INTRODUCTION

The purpose of this Task Execution Plan (PEP) is to set out the proposed strategy for the design, procurement and delivery of the Task detailed within the Client Brief.

The PEP has been prepared based on the requirements of Section 4.2 of Part A of the Term Brief and using the information provided within the X115 Client Brief and supporting appendices.

The task comprises of three blocks on Hallfield Estate which are Winchester House, Worcester House, and Lynton House.

This phase includes window replacement, internal and external repairs to all three blocks.

The three blocks were constructed circa 1955 and consist of six and ten storey purpose-built residential blocks. These buildings are Grade II listed and located within the Hallfield Estate Conservation Area. The buildings are of concrete-framed construction with brickwork infill, concrete and tile cladding, asphalt covered concrete flat roof and original 1950s steel crittall windows. Flats are accessed via external open deck asphalt walkways.

1.1 Listed Buildings and Conservation Areas

- All three blocks are grade II listed and are located within the Hallfield Estate Conservation area.

2.0 OUTLINE SCOPE

The Task involves a programme of planned refurbishment and repair works. This will vary from property to property but will include the following activities:

2.1 Building Repairs

- Condition survey
- Concrete Repairs
- Brickwork Repairs
- Asphalt Repairs
- Tile Repairs
- Cleaning and testing of rainwater goods
- CCTV drainage surveys
- Temporary access to carry out the works
- Metal work repairs
- Replacement of refuse hoppers and discharge section
- External DOFF cleaning to brickwork and tiles
- External decorations
- Replacement of landlord's metal doors
- External estate works
- Window Replacement
- Timber Front Entrance Door Replacements
- Internal & external builders work in connection (BWIC) with new doors and windows
- External Insulation to undercroft areas
- Fire Safety Works

2.2 M&E Services

- Communal lighting installation
- Extractor Fan Replacement
- Upgrading lateral mains and small power

3.0 DESIGN STRATEGY (4.2.6)

3.1 Overview and Impact on Programme

Because of the varied nature of the works required to each block we must adopt a flexible approach to progress the task within a realistic timeframe and economic budget.

We have prepared a programme which will be discussed in more detail in section 5.0.

To summarise the programme, to carry out all measured surveys, gain planning permission, carry out all other design work and then prepare fully detailed and accurate business cases will mean a period of 9 months before the work can commence on site.

This period may be improved upon if planning permission is gained more quickly than anticipated. The current timescale included within the programme at appendix 3 assumes a similar timeframe to the previous planning permission gained for the Hallfield Estate in 2012 of circa 7 months. It should, however, be possible to improve upon this timescale as the designs to be put forward will be mostly identical to the designs approved by the planning department previously.

3.2 Measured Survey Drawings

There is minimal detail of external and communal areas within the Client Brief appendices. A comprehensive set of measured survey drawings for these areas will be required to develop the task. These drawings will be used for designing, recording, surveying, and quantifying all aspects of the works. They will also be particularly important for gaining planning permission, fire risk assessment surveys and remedial work arising from these surveys.

To carry out all these surveys and draft the layout plans will take a significant amount of time. Therefore, we will commence the SPP preparation based on preliminary surveys which have already commenced during the preparation of this PEP. The 3 blocks included within this scheme are almost identical to the 3 blocks within the previous phase at Hallfield, task code W104. The drawings provided as part of W104 can be used to assist with the preliminary works for Task X115 until such time as the measured survey drawings are compiled.

We have appointed a surveyor to visit each property, take photographs, and take note of any key features and construction details. These details will be used to produce pricing documents which will be included in invitations to tender (ITT's) for trade packages and for fee proposals from measured survey/architectural consultants. Using these quotes and fee proposals, business cases will be produced for the works for WCC approval.

It will be necessary to prepare existing & proposed elevation drawings and existing & proposed floor layout drawings for external walkways and any other areas where works will be carried out. The drawings provided for the previous task W104 will not be sufficient for planning application submissions as they are specifically referenced to the blocks within the previous scheme.

Previous planning permission for the estate expired in 2021 therefore new planning permission will be required for all elements for the external repairs and refurbishments due to the listed status of the blocks. As per the brief, the planning permissions are to be separate for each block, and different applications will be required for different elements of the works.

3.3 Building repairs and refurbishment

To fulfil the requirements of appendix 8 of the client brief for general repairs, we will produce materials and workmanship specifications for the works. These will be produced in-house and where appropriate by specialist product manufacturers.

3.4 Water Ingress Works

W104 programme did encounter issues with water ingress internally to the flats at Marlow House, situated within the tiled facades on the flank elevations. There were many factors contributing to this water ingress, the most prevalent being the failing substrate behind the tiles allowing water to enter the building above the heads of the windows. As this issue only occurred on Marlow House, and not the two other blocks within W104, it was discovered that additional works had to be carried out to the windows situated within these tiled facades. Winchester House, which is the only block included within X115 with tiled flank elevations like Marlow house, will also require additional works prior to the new window installation. As we are now aware of this issue from W104, we will be able to resolve the issue during the window installation process, by inserting a bespoke drip tray detail at the heads of all the windows within the tiled facades. This proved effective on W104 at redirecting the water externally. The bespoke drip details have already been designed as part of task W104.

3.5 Fire Safety Works

The client brief requires all relevant works identified on the Fire Risk Assessment (Appendix 1) to be carried out. It also requires the Service Provider to carry out compartmentation surveys and fire door inspections.

The FRA surveys provided, however, are only for Lynton and Worcester House. Additional surveys will therefore be required for Winchester House. As part of our preliminary work in putting together this PEP, we have also checked on the Shine portal (WCC's portal for recording FRA surveys and other H&S information) for any further FRA surveys. We have, however, been unable to find a relevant survey for Winchester House, as such we will need to appoint a third-party fire engineer to conduct this survey.

As these works will not affect the critical path of the programme, there will be sufficient time for the additional surveys to be conducted once works commence on site. Therefore, a brief will be prepared on completion of the scaffold dependant surveys, and this will be issued for tender to the selected fire engineering consultants after the production of the SPP. The consultant will be appointed based on a business case, approved by WCC, which will be prepared after receipt of fee proposals.

Based on our previous knowledge of the similar blocks carried out during task W104, we will make an appropriate provisional sum to cover the likely amount of fire risk works. This provisional sum will be included as part of the SPP cost-plan and once the surveys are complete during the construction phase the full works will be scheduled out and included as part of a further business case for the fire risk works.

3.6 Building Services Installation

- Installation of communal and emergency lighting - Axis will appoint a NICEIC approved electrical contractor to carry out installing the new lighting system. For the supply, installation, test, and commission of a complete lighting installation, as indicated on the layout drawings and as described in the specification.
- The three blocks require replacement lateral mains. The containment routes, schematics and cable size calculations will be carried out by the appointed electrical sub-contractor.
- Small Power – the plant rooms located on each of the roofs are to be provided with a minimum of 1 no double switched socket outlet. The appointed electrical subcontractor will be required to install these within the plant room spaces including RCD protection and associated earthing and bonding.
- Extractor fan installation – As part of the in-flat surveys, the kitchen and bathrooms within each of the flats will be assessed to see if there is a need for new extract fans. For tenanted flats, the fans will be replaced if found to be inadequate or new ones installed if there are none in existence. Leaseholders will also be given the opportunity to ‘opt-in’ for these works if they would like them carried out.

As part of the previous task (W104) Axis commissioned an electrical specification and design for the whole of the Hallfield Estate. These same designs and specifications will be used as part of the tender documentation for this task, X115. The appointed electrical subcontractor will, however, be required to review the design documentation and include within their tender return for updating or amending the design information (if required) to ensure that works are fully compliant with the latest electrical regulations.

3.7 Material design requirements

Table A of the client brief sets out design requirements, desired manufacturers, guarantee/warranty requirement and pricing methodology. We have detailed this information together with our comments on our X115 tender enquiry list in Appendix 4 of this PEP document.

3.8 Consultant Design and Specification

Upgrading of compartmentation and general fire strategy will be designed by an external fire engineering consultant.

3.9 Sub-contract Design and specification

Sub-contract design will be limited to the following:

- Non-Standard Scaffolding
- Electrical Installation
- Water Ingress Works
- Timber and metal doors
- Replacement of refuse hoppers and discharge section

3.10 Manufacturer design and specification

- External concrete repairs & coating
- Decorations
- Aluminium Windows

4.0 CONSENTS; PLANNING, LISTED BUILDING, CONSERVATION, BUILDING CONTROL, PARTY WALLS

4.1 Planning – Conservation Area; article 4 directions

Lynton House, Winchester House, and Worchester House blocks have an article 4 direction relating to basement development. It is unlikely that the proposed works will be affected by the direction, but this will be confirmed with WCC Planning and Conservation Officer during preparation of the proposals.

4.2 Planning - Listed Building Consent

Lynton House, Winchester House, and Worchester House blocks are grade II listed buildings. Listed building consent is required for the works associated with the blocks. The elements of the works that require listed building consent are as follows:

- Replacement of old crittall windows with new aluminium windows
- Replacement of timber FED's
- Replacement of steel landlords' doors including plant rooms, bin stores and service riser cupboards
- Replacement of lighting, power, containment, and extractor fans
- External facade repairs including brickwork, concrete, asphalt, façade tiling, insulated soffits and doff cleaning
- External redecoration

Listed building consent for the replacement of windows and doors to all blocks on the Hallfield Estate was granted in May 2017, however, this has now expired as consent was granted subject to a condition that the works would be commenced within 3 years of the decision date. (Ref: 16/08899/COLBC)

Listed building consent for environmental works to all blocks on the Hallfield Estate was granted in March 2017. (Ref: 17/01690/COMADL).

Axis will appoint a specialist competent planning consultant to seek relevant listed building consents for elements of the proposed works.

A business case has been prepared as part of this PEP document for the appointment of a planning consultant to undertake all that is required to gain planning permission for the works to proceed. This business case has been included within appendix 5. On approval from WCC, Axis will immediately appoint the recommended consultant to start this process, as it is key this permission is gained prior to any works starting on site.

4.3 Planning Generally

Axis will obtain the relevant planning permission and listed building consent for the full external scope of works. A competent consultant will be instructed by Axis to complete this activity. A business case has been submitted by Axis to WCC to appoint a consultant and all relevant costs associated with this task have been submitted.

4.4 Building Regulations

WCC Building Control will, subject to available resources be approached to carry out the plan checking and site inspections as required. Based on the client brief this will be limited to:

- Fire doors installation
- Roof replacement or repairs greater than 25% of roof area
- Electrical installations
- Window installation (for windows installed in buildings eighteen metres or above)

4.5 Party Wall Consents

Party wall consents will not be required for the nature of works in this programme. WCC and Axis can advise if this changes.

4.6 Design risk assessment

CDM 2015 Regulations, Regulation 9 - Duties of Designers; Designers must eliminate as far as reasonably practice, foreseeable risks to the Health & Safety of those who are going to construct the design, maintain the structure and use the structure. If the Designer cannot eliminate the risks, they are to take steps to reduce those risks, provide information on those risks to the Principal Designer, and ensure appropriate information is included in the Health & Safety File. In accordance with the above regulations, we have set out all risks identified at this early design stage and the relevant control measures. These can be found in the risk assessment at Appendix 4 of the client brief. The design risk assessment will be reviewed and updated throughout the SPP preparation period.

5.0 PROGRAMME (4.2.11)

We have prepared a draft programme for pre-construction activities during the SPP phase and for the overall construction period. This will be reviewed and developed during the preparation of the proposals.

The Pre-construction programme identifies all relevant activities including:

- Surveys
- Design
- Consents and approvals
- Supply chain ITT's and drafting of business cases
- Preparation of cost plan
- Drafting of proposals document
- WCC review and subsequent amendments
- Section 20 Consultation with Leaseholders

The outline construction programme is indicative at this stage and has been prepared to assess the value of site overheads. The programme will be further developed during the SPP phase and will show the main construction and repair activities plus the following key milestone activities:

- Benchmarks and samples
- Resident ballots
- Quality inspections
- Key communications

The proposed programme identifies:

- Pre-commencement tasks and mobilisation timeframes
- Delivery approach; task sequencing and workflow efficiencies
- The critical path for completion
- Key milestones

The programmes can be found at Appendix 3 of this PEP.

In order to meet the target delivery date, whilst maintaining a clear focus on quality, we will deliver workflow efficiencies through concurrent sequencing of works wherever possible. Works will commence to Winchester House, before progressing onto Worcester House and finally Lynton House, centralising resources and providing certainty as to workflow and progress. Property surveys will be completed prior to work commencing on each block – covering: Measured Site Survey, Refurbishment and Demolition Asbestos Survey, CCTV drainage survey, Tenant Front Door Survey, Flat condition survey, and Electrical Survey and creation of electrical inspection condition report.

The pre-construction programme period is 40 weeks which includes a period of 26 weeks for planning permission and 8 weeks for leasehold consultation. This programme has been optimised to achieve the earliest commencement date and provides the best balance between speed and cost certainty. This programme is based on carrying out preliminary surveys during the PEP phase. These surveys will consist of photographic records, a sketch plan and details of key features or construction details. They will not be as accurate as a full measured survey, but they will provide enough information to prepare an accurate budget for the works. Full surveys can then be carried out without being critical to commencement date on site.

To fully design the FRA works we would need to carry out the following activities during the SPP phase:

- Surveys by Axis to prepare ITTs for the measured survey work
- Send out ITTs for the above allowing time to price
- Prepare business case for WCC approval and appoint measured survey consultant
- Allow time to carry out measured surveys and draft scale layouts.
- Issue drawings to the fire engineering consultant for them to mark up during their surveys
- Await FRA surveys to be issued and send these out for pricing by the supply chain.

The period to carry out the above activities is 12 weeks from an instruction to commence. After this the ITT still needs to be priced by the supply chain and a business case produced which is a further 4 weeks.

6.0 RESOURCE PLAN AND PRELIMINARIES (4.2.13)

During the pre-commencement phase Dan Sams who is our Commercial Manager for the framework will act as an overall design co-ordinator.

The SPP document will be prepared by Harry Parsons and Sam Farah, who are surveyors within the preconstruction team for Axis working on the WCC Partnering Contract.. During this phase, Axis will co-ordinate surveys by external consultants and our own in-house staff, prepare invitation to tender packs for consultants and specialist trades ,draft the final business cases and draft the proposals document and programme.

6.1 Site overheads

We have included a provisional schedule of proposed site overheads within the cost-plan at Appendix 2. This is based on the following site staff being allocated to the task during the construction phase:

6.2 Visiting staff

- Project Manager – 10% of their time allocated
- M&E Manger – 20% of their time allocated
- Senior Resident Liaison Officer (SRLO) – 20% of their time allocated
- Senior Quantity Surveyor – 10% of their time allocated
- H&S Manager – 1 visit every 2 weeks

6.3 Site based staff

- Contracts Manager – 50% of their time allocated
- Quantity Surveyor – 40% of their time allocated
- Site manager- 100% allocation
- Assistant Site Manager - 100% allocation
- Finishing Foreman -100 % allocation (for final 26 weeks of programme)
- Trainee QS – 100% allocation (for site measure and re-measure periods)
- Resident Liaison Officer (RLO) – 100% allocation
- Assistant RLO – 100% allocation (for the first 26 weeks of the programme to assist with appointments)
- Full-time Labourer- 100% allocation

At this stage we are unable to confirm the identity of the staff outlined above as this is very much dependent on when the Task commences on site. We will provide CVs of key staff to include in the SPP nearer to the commencement date.

At this stage, the costs are based on a 78-week construction phase with a 4-week lead-in beforehand. This will be firmed up during the SPP phase after more detailed discussions with our supply chain partners.

7.0 PROVISIONAL COST PLAN (4.2.18)

We have previously reviewed the provisional cost plan prior to issuing this PEP and provided our feedback to WCC. The review was based on the final account from W104 which has been adjusted to account for the extreme material and labour cost increases experienced throughout 2020 and 2021. The cost for preliminaries and design fees have also been re-priced on the new cost plus model basis to account for the levels required.

The capital cost of the task currently stands at £5,152,100.27 excluding any WCC fees or any provision for increased costs which will be added to the risk register.

A copy of this assessment is included at Appendix 2 of this PEP.

7.1 Pre-Construction Activities

We have identified pre-construction activities separately in the cost plan. These will include:

- Measured Surveys and production of drawings for planning permission
- External repair surveys and scheduling (walkway and staircase areas)
- Scaffold Design

Other surveys, such as asbestos surveys and drainage CCTV surveys, will be carried out so the information is available in a timely fashion for commencement on site but will not be critical to preparing the proposals.

7.2 Opportunities schedule

As this task is the third phase carried out at the Hallfield Estate, most opportunities for cost/benefits have already been assessed and implemented wherever possible. Task X115 will follow the same principles of the previous phases to achieve best value for money.

8.0 ENABLING WORKS (4.2.22)

We are proposing to carry out detailed surveys for repair works after commencement when access is available and to a programme that does not affect the delivery of the SPP. The following enabling work will be required during the SPP:

- Measured Surveys and production of drawings for planning permission (after approval of business case by WCC)
- External repair surveys and scheduling (walkway and staircase areas)
- Scaffold Design
- FRA and compartment surveys (after approval of a business case by WCC)

Firm costs have been included in the PEP budget for the first element. Provisional allowances have been included for the remaining elements pending fee proposals being received.

9.0 RISK REGISTER (4.2.24)

We have drafted a preliminary risk register that is specific to this task. This details cost risk, owners, actions, mitigation, and residual risks. This can be found in Appendix 6 and will be updated throughout the life of the Task.

10.0 SURVEY, MEASUREMENT AND SCHEDULING STRATEGY (4.2.26)

Axis have recommended to WCC that a make safe survey is to be carried out as soon as possible on all three blocks after a walk around the site showed that there are numerous patches of exposed concrete. WCC have approved this survey to proceed and Axis are seeking costs for doing so.

Before the project begins, precondition surveys will need to be conducted around each block's external elements as well as each flats internals. This will be carried out before any works commence and before the scaffold is erected.

In addition to this Axis have enquired about the asbestos survey for the blocks due to there being none available for the flat's internals on shine. If there are no recent surveys, Axis will propose that these are carried out with the other in-flat surveys, to minimise disruption to the residents.

An initial repair survey will also be conducted to all accessible areas, such as the front elevation walkways and staircases. These surveys will be used to produce a schedule of initial provisional quantities of repairs for the SPP. Other areas, such as the rear elevation and roof, will not be accessible until scaffold is erected. For the SPP, estimated quantities will be provided based on the level of repairs carried out under the previous task W104.

The internal surveys can be carried out whilst the scaffolding is being erected and can be done from the top floor down. The internal surveys will include windows surveys, doors surveys and electrical surveys. The internal surveys will have a representative from WCC, Axis and the appointed subcontractors.

The internal BWIC with the windows, doors and extractor fans will be conducted on a 'basket' style rate. This will be one rate which will be applied to each property to cover all of the repair works required. There may be exceptions to the basket rate which will be picked up during the initial in-flat pre-condition survey. An example of these exceptions would be if there are special tiles, such as marble, already in the flat that need to be repaired or replaced following the new installation works. Based on our previous experiences from the first 2 phases, exceptions like this are a very small possibility, as such it is not practical to include for these eventualities within a basket style rate. A general provisional sum will be included within the SPP cost-plan to cover these exceptions if they occur.

Once scaffold is erected, the surveying strategy for the building's externals will follow the same template as carried out on W104. Once the scaffolding has been erected on each block a joint survey will be arranged with a representative from Axis, WCC and the subcontractor carrying out the external repairs. From this survey a photographic record document, using SnagID or similar, will be created with photos of the repairs, their location and the measurement. The repairs will then be scheduled out in an excel template and priced with the agreed business case rates. Along with this, drawings will be marked up to show the exact location of the repairs on the blocks and after these documents have been collated, they will be forwarded to WCC to agree which repairs need to be carried out.

Once the repairs have been agreed, the subcontractor will then carry out the repairs and once they have been completed a remeasurement survey will be done. The purpose of the re-measurement survey is to conclude the final quantities of repairs, as additional ones may be discovered during the repair process. There will also be some unknown elements to the initially identified repairs. For example, an area of damaged concrete can be picked up during the survey, but the full depth of the repair will not be known until the defective concrete is removed to a sound base. There may also be issues behind the concrete, like corroded metal rebar which may need to be repaired.

From the remeasurement survey an updated SnagID will be created with the actual measurements of the final repairs and the final photos. The final repairs will then be scheduled out to show the actual cost for all repairs and this will be shown against the original schedule cost. Remeasured marked up drawings will also be created and once each blocks information is finalised the external repairs packages will be sent to WCC for final confirmation.

11.0 INFORMATION REQUIRED (4.2.28)

We will maintain an information required register during the SPP phase. This will be stored in the WCC SharePoint folder for the task and be a live document that can be edited by all task team members.

12.0 PROCUREMENT STRATEGY (4.2.30)

In Appendix 4 we have identified most of our proposed supply chain for the Task. These have been selected because of their previous experience and performance on W104 and similar projects.

All trade packages will be procured through a competitive dialogue with the specialist contractors. The award criteria will be based on a combination of cost and quality. The precise allocation of the cost/quality scoring will vary for each package, but the quality score will not exceed 30% of the overall score for any package. This approach still puts a majority emphasis on price and obtaining best overall value for WCC.

The quality submission will be kept to a minimum as requesting too much supporting documentation from smaller trade contractors discourages them from pricing at all. We have included a typical assessment pro-forma for reference at appendix 7.

13.0 COMMUNICATION PLAN (4.2.34)

A provisional communication plan has been included at appendix 8. This will be updated during production of the SPP following any recommended changes.

14.0 APPENDIX LIST

Appendix 1 – Suggested Site Set-up

Appendix 2 – Budget Cost Plan

Appendix 3 – Draft Programme

Appendix 4 – Design & Survey Strategy and Supply Chain

Appendix 5 – Planning Consultant Business Case

Appendix 6 – Risk Register

Appendix 7 – Award Criteria

Appendix 8 – Provisional Communication Plan