

TERM PARTNERING CONTRACT

WEST AREA

PROJECT EXECUTION PLAN

T156 Mozart Estate South

CONTENTS

1.0	Introduction
2.0	Outline Scope
3.0	Design Strategy
4.0	Consents: Planning, Listed Building, Conservation, Building Control, Party Walls
5.0	Programme
6.0	Resource Plan and Preliminaries
7.0	Provisional Cost Plan
8.0	Enabling Works
9.0	Risk Register
10.0	Survey Measurement and Scheduling Strategy
11.0	Information Required
12.0	Procurement Strategy
13.0	Communication Plan

Version Control

Revision	Date	Reason
0	31 March 2023	First Issue
1	15 June 2023	Updated Pep due to wording error regarding replacement/repairs of windows.

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 T156 Client Brief and supporting appendices.

The task comprises of Nineteen blocks in Mozart Estate which are:

1. Banister House
2. Bantock House
3. Batten House
4. Boyce House
5. Courtville House
6. Croft House
7. Danby House
8. Farnaby House
9. Lawes House
10. Leeve House
11. Longhurst House
12. Mcfarren House
13. Mounsey House
14. Mundy House
15. Naylor House
16. Parry Road Houses
17. Purday House
18. Lancefield House
19. Wornham House

This phase includes external and internal refurbishment works, electrical and environmental works. The client brief document provides detailed block descriptions referenced in Appendix 6.

1.1 Listed Buildings and Conservation Areas

The Nineteen Blocks mentioned above do not require planning permission due to not being in a conservation area or not being a listed building.

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
- Roof repairs
- Tile Repairs
- Cleaning and testing of rainwater goods
- CCTV drainage surveys
- External repairs
- Internal & external decorations
- Internal (Communal) Repairs
- Window Repairs
- External Landscaping
- Scaffold

2.2 M&E Services

- Communal lighting installation
- Minor works to Power installations. Subject to site survey.

3.0 DESIGN STRATEGY (4.2.6)

3.1 Overview and Impact on Programme

Because of the varied nature of the blocks and the repairs they require 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.

In summary, to carry out all measured surveys, other design work and then prepare fully detailed and accurate business cases will mean a period of over 9 months before the work can commence on site.

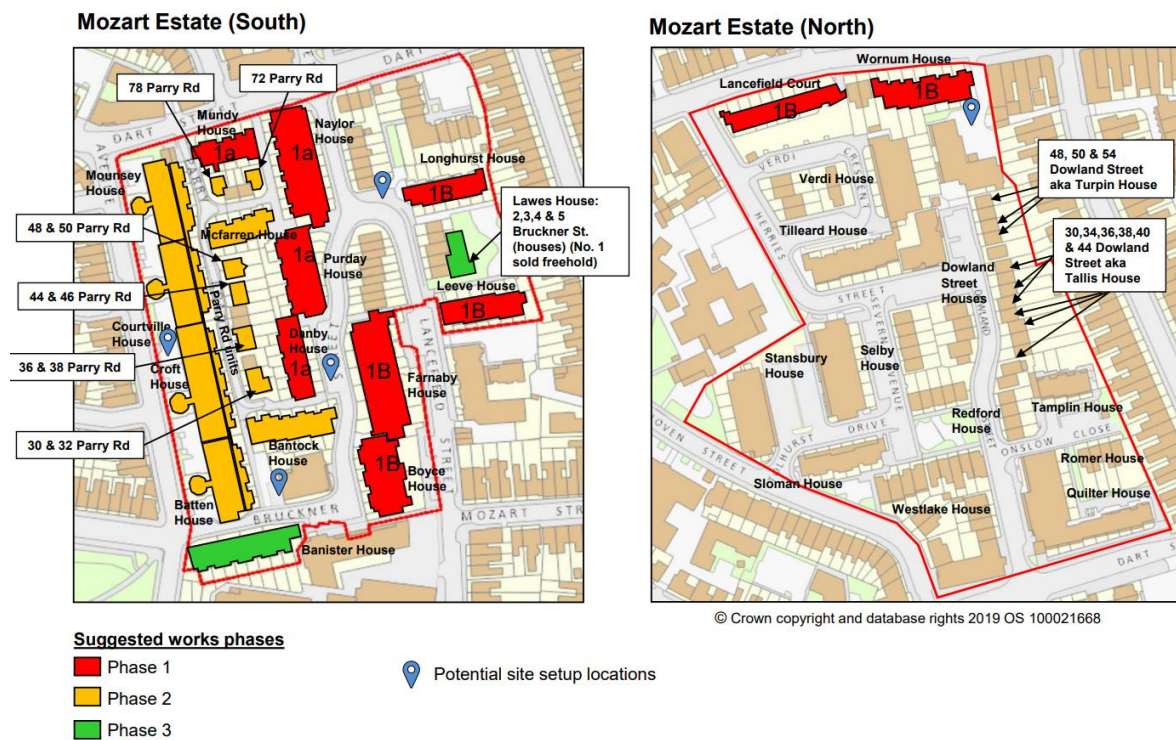
The suggested Phase 1 plan, Axis has decided to split this up so we can scope up works to a reasonable amount of the properties in a timely manner.

This will allow Axis to get a detail scope of what we have defined as phase 1a below. From this Axis will be able to get a gauge of the remainder of the properties. This will give Axis a basis to tender from with measured provisional quantities for phase 1a and estimated provisional quantities for the remainder of the phases.

As there may be some unknowns in the last phases, we may need to consider a general a contingency figure for any anomalies that do arise. Although this may not be ideal we feel this is the only way can look to achieve the December 2023 start date

As per below site plan Axis are suggesting we do a Phase 1A and a Phase 1B. Phase 2 and Phase 3 we are happy to keep the same.

- Phase 1A: Naylor House, Purday House, Danby House, Mundy House
- Phase 1B: Longhurst House, Leeve House, Farnaby House, Boyce House, Lancefield Court, Wornum House



3.2 Measured Survey Drawings

The following section sets out our approach to designing and specifying the work detailed in the Client Brief and any other elements identified in our preliminary site visits carried out while preparing this PEP.

The elements of this project are predominantly product design and will require input from a consultant. Certain aspects of the work will require verification to establish the extent of the work required such as where up-to-date surveys / reports are not available but, in all cases, specifications will be prepared by the manufacturers.

As discussed above, 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.

We have appointed a surveyor to visit each block, take photographs and produce detailed specification notes highlighting 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. Using these quotes, business cases will be produced for these works for WCC approval.

It will be necessary to prepare elevation drawings. The elevation drawings will also be 'marked up' on site to show the areas requiring attention, this process will make identifying, quantifying and ultimately pricing items easier.

Axis will arrange Drone Surveys to see the state the roof is in for each property. This will help define if roofs will need a repair or a full replacement.

3.3 Building repairs and refurbishment

To fulfil the requirements of Section 9 of the client brief for general repairs we will produce materials and workmanship specifications for the works. These will be produced by our Design Consultants partners Thomas & Thomas.

3.4 Building Services Installation

As part of the works Axis will be surveying the electrical power, lightning protection, emergency lighting and lighting to all blocks in the scheme. Once surveyed, recommendations will be put forward for repairs and/or replacements.

The appointed electrical contractor will be provided with the measured survey drawings so they can produce their own design and working drawings.

3.5 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 T156 tender enquiry list in Appendix 7 of this PEP documents.

3.6 Consultant Design and Specification

A surveying /design consultant has been appointed to undertake the scoping and detailed design of the building fabric works. This will involve the preparation of marked-up elevation drawings, detailed NBS specifications, incorporating specialist manufacturers items within the documentation.

Consultant design will cover the following.

- Roofing repairs and replacement
- Rainwater goods repairs and replacement.
- Brickwork repairs
- Concrete repairs
- Balcony and walkway repairs and resurfacing.
- Internal and external redecorations.
- Performance Specification or mechanical or electrical works

Specifications will be prepared and issued in accordance with the proposed phased programme set out above in order to allow the works to commence on site in 2023. Surveys will continue on site once the first phase has been submitted to the client.

Axis will work alongside the appointed consultant to quantify works to send to the supply chain for pricing.

In regards to the Windows, we note that a separate programme is underway for the replacement of some of the Windows in Farnaby house, Naylor and Boyce house (openable windows in these three blocks which are broken) therefore, we will be allowing in our PEP budget for repairs only to the remaining Windows however, as part of the SPP we will be conducting a full condition survey to determine if replacement is the more economically viable route.

Axis will carry out a condition survey of all communal windows with the exception of Farnaby House due to this, we will also inspect a sample of flat windows (10%) as we will need access for balcony inspections.

We will then use the data collected from the internal inspections, external site walk arounds, drone survey footage to develop a proposed scope for window inspections.

3.7 Sub-contract Design and specification

Sub-contract design will be limited to the following:

- Non-Standard Scaffolding
- Electrical Installation

3.8 Manufacturer design and specification

- External concrete repairs coating
- Decorations including class B internal treatments
- Roofing specification including tapered insulation where necessary.
- PV design were applicable to Flat Roofs

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

4.1 Planning – Conservation Area; article 4 directions

The blocks on the Mozart Estate are not in a conservation area, there are no article 4 directions in place.

4.2 Planning - Listed Building Consent

The blocks on the Mozart Estate are not listed or locally listed. The works will not require listed building consent.

4.3 Planning Generally

If roof detailing has to be altered to accommodate additional insulation as part of repairs or replacement, then this may require a planning application. We will attempt to identify these roofs during the SPP preparation phase to mitigate delays that obtaining any permissions may cause.

Should the client opt for window replacement works as part of the programme, then planning permission would also be required for this element.

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:

- Roof replacement or repairs greater than 25% of roof area
- Electrical installations
- Window installation (for windows installed in buildings 18 metres or above)

4.5 Party Wall Consents

Due to the configuration of the properties and the nature of the proposed works it is not envisaged that party wall notices will be required. Our appointed surveyors will carry out an appraisal during the PEP to ensure that this is the case.

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

The pre-construction programme period is 37 weeks which includes a period of 7 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 full surveys, full photographic records and full measured drawings for Phase 1A. The remaining surveys will be surveyed by the end of SPP period however, for tendering purposes the remaining phases will have preliminary surveys with estimated quantities for repair works.

This approach has been discussed with WCC and it has been agreed that this is the best way to proceed

6.0 RESOURCE PLAN AND PRELIMINARIES (4.2.13)

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

The SPP document will be prepared by Shaheen Rahman and Thomas & Thomas , with the process being overseen by Dan Sams. During this Axis will co-ordinate surveys by external consultants and their own in-house staff, prepare invitation to tender packs for consultants and specialist trades and draft the final business cases. They will draft the proposals document and programme.

6.1 Site overheads

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

6.2 Visiting staff

Senior Task Manager – 10% of their time allocated

Health and Safety manager – periodic visits.

M&E Manager – 20% of their time allocated

6.3 Site based staff

Contract Manager 100% allocation

2x Site manager 100% allocation

2x Site supervisor 100% allocation

Senior QS-visiting

Trainee QS-visiting, 100% allocation

Quantity surveyor- 100% allocation

Senior RLO- visiting

Resident Liaison Officer 100% allocation

Trainee RLO- - 100% allocation

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 CV's of key staff to include in the SPP nearer to the commencement date.

At this stage the costs are based on a 68 -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 previous projects on a similar nature. The capital cost of the task currently stands at the total cost of **£9,347,702.40**. However, **£267,750.00** makes up the Sustainability costs. 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 be limited to aerial photograph surveys and preliminary surveys of elevations and communal areas. Measured 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

At this stage because the scope of works is based around archetypes and very budgetary costs, it isn't possible to identify cost saving opportunities. The nature of the work is quite simple and the more work that is carried out the more expensive it will become. In our experience the key to managing the budget for multiple block tasks is to ensure that a robust survey and approval system is in place so that only important work is carried out. In this respect scaffold access is normally quite a large proportion of the cost of repairs. On previous multiple block tasks, we endeavoured to maximise the cost/benefit of the scaffold by ensuring that any part of the fabric that will not last until the next cyclical programme in around 10 years is repaired or replaced at the time the scaffold is in place. For WCC to have to carry out ad-hoc repairs outside the major works programme will be very costly if it requires scaffolding.

8.0 ENABLING WORKS (4.2.22)

We are proposing to carry out detailed surveys 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:

- Preliminary surveys
- Measured 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 second two 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 4 and will be updated throughout the life of the Task.

10.0 SURVEY, MEASUREMENT AND SCHEDULING STRATEGY (4.2.26)

Some areas of the Blocks are relative straight forward without full scaffold for example; blocks with access to Balconies/Walkways will allow Axis a close review of a facades at high level where the balconies are situated. Other areas will not be suitable without full scaffold. This affords a close-up inspection of the condition of most external elements and causes minimal disruption or inconvenience to the residents.

It is impractical to erect scaffold solely for survey purposes. A method for assessing the realistic value of repairs needs to be agreed with WCC prior to the SPP phase.

On previous tasks of the similar nature (W104, X108) preliminary surveys was conducted during the SPP phase to produce a realistic set of provisional quantities to of the type of repairs to were to be undertaken. This was used to produce an estimated cost per block based on tendered fix rate. Once full scaffold is erected, a close up inspection will be undertaken of each block and the full extent of all repairs will be confirmed. Axis plan to approach T156 using the same strategy, however as noted earlier in this document above, only phase 1A will be fully surveyed by tender stage therefore there maybe items of repairs for the other phases which are not identified at tender stage however they will have not have fixed rates. It has been recommend a 10% contingency for the remainder of the blocks for any items of repairs which are anomalous in comparison to the fully surveyed phase. If additional items are found, reasonable rates will be agreed following the process described in the TPC price framework.

During the carrying out of the works if any minor changes to the survey quantities were identified then the survey was amended by Axis up to a maximum value of £500. Changes involving greater values were referred back to WCC's QS and Project Manager for instruction.

Without direct access to the roofs and roof spaces, this will be impossible to say with certainty what work is required unless we include an allowance for complete replacement. Once we are in receipt of the aerial photographs and can visually assess the condition of the roofs we will liaise with WCC to agree how we make budget provision for work to the roofs.

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)

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, X108 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.

13.0 COMMUNICATION PLAN (4.2.34)

As shown by appendix 5