

## **Measured Survey and Planning Application Services - 3 Coolport, Coolmine Ind Estate, D15**

03.11.2021

### **PRELIMINARY SERVICES**

#### **1. Stage A**

- 1.1  Discuss the client's aims and requirements, give general advice, outline possible course of action and the scopes of service to be provided.
- 1.2  Visit the site/property and carry out initial inspections.
- 1.3  Take a detailed brief from the client.
- 1.4  Advise the client with regard to the general application of the Safety, Health and Welfare at Work (Construction) Regulations 2013 (SHWWR 2013).
- 1.5  Advise client with regard to the obligations under the Housing Grants, Construction and Regeneration Act 1996 if deemed to apply, regarding payment and rights to an adjudicator.

#### **2. Stage B**

- 2.1  Present an initial appraisal to the client including:
  - 2.1.1 advice, recommendations and feasibility on the extent of works;
  - 2.1.2 advice on the need for other consultants, conservators and specialist contractors, sub-contractors and suppliers;
  - 2.1.3 advice on approximate costs, VAT, funding and possible grant aid;
  - 2.1.4 an outline timetable for completion of the works;
  - 2.1.5 suggested contract procedures to be adopted;
  - 2.1.6 the extent of statutory approvals required.
- 2.2  Carry out a measured survey of the existing buildings and/or the site and produce survey drawings as required.
- 2.3  Advise on the need for opening up parts of the property and for the provision of special access for inspecting the building and, if necessary:
  - 2.3.1 Advise on the need for (and arrange for and direct) contractors to carry out the opening up or provision of access and making safe.

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- 2.4  Carry out a detailed inspection of the property and prepare a report on the condition and nature and extent of proposals, advising on prioritizing of works and an indication of costs.
- 2.5  Carry out research of archival material where appropriate.
- 2.6  Consult with other consultants and conservators as appropriate, and integrate information from them in the report.
- 2.7  Comply with the Safety, Health and Welfare at Work (Construction) Regulations 2013 and liaise with the Project Supervisor Design Process (PSDP) as appropriate, including carrying out risk assessments where necessary.

## PRE-CONTRACT SERVICES

### 3. Stage C

- 3.1  Present outline sketch proposals, changes retention issues, etc ~~and indication of costs to the client, after liaison with other consultants. Receive any amended instructions.~~
- 3.2  Consult with statutory authorities and advise the employer on the extent of, and need for compliance with statutory provisions.
- 3.3  Undertake planning searches in relation to the property and properties in the immediate area with regard to oppose changes and proposed use .
- 3.4  Undertake pre planning consultation with the local authority in relation to proposed changes to the property and proposed change of use
- 3.3  Comply with the Safety, Health and Welfare at Work (Construction) Regulations 2013 and liaise with the Project Supervisor Design Process (PSDP) as appropriate including carrying out risk assessments where necessary.

### 4. Stage D

- 4.1  Prepare and present, for approval, planning design for the scheme, including:
  - 4.1.1 sketch drawings to show the layout and appearance of the scheme;
  - 4.1.2 ~~budget costings;~~
  - 4.1.3 timetable to completion;
  - 4.1.4 schedule of finishes and details of the basic construction;
  - 4.1.5 ~~list of possible firms for inclusion on tender lists;~~
  - 4.1.6 suggested contract procedures to be adopted.

4.1.7 Prepare & Complete full Set of Planning Permission Drawings. Complete Planning Application and Supporting Documentation. Seek client's approval prior to submission.

4.2  Comply with the Safety, Health and Welfare at Work (Construction) Regulations 2013 and liaise with the Project Supervisor Design Process (PSDP) as appropriate including carrying out risk assessments where necessary.

## 5. Stage E

5.1  Complete and Submit a Planning Application, including planning drawings and supporting documentation and advise on timescales for:

5.1.1 planning approvals;

5.1.2 ~~building regulation approvals;~~

5.1.3 ~~other statutory consents.~~

5.2  In co-operation with other appointed consultants and conservators where applicable, prepare full working drawings sufficient for the construction of the project.

5.3  Comply with the Safety, Health and Welfare at Work (Construction) Regulations 2013 and liaise with the Project Supervisor Design Process (PSDP) as appropriate including carrying out risk assessments where necessary.

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## 6. Stage F - N/A

6.1  Prepare sub-contract specifications, invite tenders for sub-contract works and suppliers.

6.2  Comply with the Safety, Health and Welfare at Work (Construction) Regulations 2013 and liaise with the Project Supervisor Design Process (PSDP) as appropriate including carrying out risk assessments where necessary.

## 7. Stage G - - N/A

7.1  Prepare specifications and/or Bills of Quantities or, where a quantity surveyor has been separately appointed, liaise with the quantity surveyor to prepare Bills of Quantities.

- 7.2  Prepare tender documents and invite tenders or negotiate prices with suitable contractors,

## 8. Stage H - N/A

- 8.1  Prepare tender analysis and advise the employer on tenders received.
- 8.2  Advise on the appointment of contractors, arranging pre-contract meetings to discuss programme and organization.
- 8.3  Prepare contract documents and arrange signature by both parties.
- 8.4  Supply all necessary information to the contractors, arranging for the commencement of the works and checking the contractor's programme.
- 8.5  Visit the site periodically, or as may be required, to monitor the progress and quality and provide further information should opening up reveal unforeseen problems.
- 8.6  Prepare monthly reports to the employer on progress and actual expenditure in consultation with other consultants where appointed and relating expenditure to budget.
- 8.7  Administer the terms of the building contract.
- 8.8  In consultation with other consultants where appointed, examine all documents, measuring works, and agree the final account with the contractor.
- 8.9  Obtain record drawings, if required, showing the services as installed. Supply initial guidance on maintenance.
- 8.10  Comply with the Safety, Health and Welfare at Work (Construction) Regulations 2013 and liaise with the Project Supervisor Design Process (PSDP) as appropriate including carrying out risk assessments where necessary.

## 9. Additional Services - N/A

- 9.1  The following additional services may be offered in connection with general building works:
- 9.1.1  prepare a feasibility study in accordance with BS Scope of Service 5 (Feasibility Studies);
- 9.1.2  negotiate licences;

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- 9.1.3  consider data put forward in support of loss and expense and/or extension of time or other claims under the terms of the building contract and negotiate a settlement on behalf of the client;
  - 9.1.4  construct models and special presentation drawings;
  - 9.1.5  advise on party walls, rights of light, rights of way and rights of support;
  - 9.1.6  prepare a maintenance manual for the property;
  - 9.1.7  advise on the appointment of specialists in respect of soil investigations including soil contamination;
  - 9.1.8  provide on-site supervision of the construction works;
  - 9.1.9  act as PSDP under the Safety, Health and Welfare at Work (Construction) Regulations 2013 in accordance with BS Scopes of Service 9.
  - 9.1.10  design or advise on interior design including the selection of furniture and fittings;
  - 9.1.11  carry out exceptional negotiations with planning and building control authorities, including appeals, waivers and relaxations;
  - 9.1.12  carry out recording of specialist details, for example, drawings and photographs on opening up;
  - 9.1.13  make applications for grants, liaising with grant bodies and providing documentation and advice on or completing claims for payment of grants;
  - 9.1.14  liaise and negotiate with advisory bodies.
  - 9.1.15  prepare record as built drawings;
  - 9.1.16  advise on work in connection with fire and security alarms and means of escape.
- 9.2  The following additional services may be offered in connection with conservation works
- 9.2.1  co-ordinate historical research and specialist recording of the property;

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- 9.2.2  co-ordinate archaeological research and recording;
- 9.2.3  carry out exceptional negotiations with English Heritage and other equivalent national bodies;
- 9.2.4  cross reference should also be made to the other scopes of service where the descriptions provided are suitable and can be applied to conservation work.