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**Appendix 1**

# Lot 1 – General Project Management and Estates Consultancy

## Scope of Services

This Lot is intended to support the delivery of capital and estate-related projects through the provision of high-quality, collaborative professional consultancy services. Consultants appointed under this Lot will provide strategic, technical, and project-level advice to Institutions, enabling effective planning, delivery, and management of built environment projects.

Services may include, but are not limited to:

* Project and programme management
* Cost management and quantity surveying
* Architectural design and technical drawing support
* Mechanical and Electrical (M&E) design and coordination
* Structural engineering and design services
* Condition and lifecycle surveys (fabric and M&E), including structural assessment and repair advice
* Contract administration and contractor liaison
* Design and specification development
* Energy efficiency and sustainability consultancy
* Fire safety advisory and risk assessment
* CDM compliance, including Principal Designer role
* Health and safety oversight and reporting
* Planning and statutory consents
* Risk and quality management
* Tender preparation and evaluation support
* Professional advice across estates, construction, regulation, and legal matters

It is acknowledged that roles may overlap; consultants may be required to operate flexibly across these functions, depending on project needs.

Where applicable, all services must adhere to relevant statutory requirements, including **CDM Regulations 2015**, building regulations, planning legislation, and health and safety law.

# Service Descriptions and Requirements

This section outlines the specific responsibilities associated with each service area, acknowledging that delivery may be combined or adapted to meet individual project needs:

## Project and Programme Management

* Lead or support the end-to-end delivery of capital projects.
* Develop project execution plans, stakeholder engagement strategies, and governance models.
* Monitor performance against time, cost, quality, and risk parameters.
* Ensure compliance with internal approval gateways and funding conditions.

## Cost Management and Quantity Surveying

* Provide feasibility-level cost estimates.
* Monitor budgets, tender returns, and financial performance throughout the project lifecycle.
* Undertake value engineering where appropriate.
* Report on financial status to project boards and funders.

## Architectural Design and Technical Drawings

* Prepare architectural concept designs, planning drawings, and technical working drawings.
* Ensure that designs meet institutional briefs, comply with planning and regulatory requirements, and reflect sustainability, accessibility, and operational considerations.
* Liaise with statutory consultees (e.g. planning, fire, access).
* Collaborate with multidisciplinary teams to integrate architectural proposals with M&E and structural inputs.
* Provide input to design risk assessments and CDM documentation.

## Mechanical and Electrical (M&E) Design

* Develop designs for mechanical, electrical, and public health services, including heating, ventilation, lighting, power, and building management systems.
* Carry out performance specifications, load assessments, and system integration plans.
* Ensure design aligns with energy efficiency and decarbonisation goals, including net zero strategies.
* Coordinate with architectural and structural designers and contribute to clash detection processes using BIM where applicable.
* Support commissioning, snagging, and handover stages as needed.

## ****Structural** **Design****

* Provide structural engineering advice for new-build and refurbishment projects, including feasibility assessments, load analysis, and foundation design.
* Develop coordinated structural drawings, calculations, and specifications to support building design and statutory approvals.
* Ensure integration with architectural and M&E designs and provide input to multidisciplinary coordination processes.
* Advise on materials, structural integrity, sustainability of solutions, and cost-efficiency.
* Participate in design risk assessments and contribute to CDM compliance documentation.

## Condition and Lifecycle Surveys

* Survey and report on the condition of buildings, M&E systems, and fabric.
* Identify and prioritise repairs with costed recommendations.
* Support lifecycle planning and asset management strategies.

## Contract Administration and Contractor Liaison

* Administer construction contracts (e.g., NEC, JCT) in accordance with best practice.
* Manage contract changes, valuations, and certification.
* Liaise with contractors to resolve issues and monitor compliance.

## Design and Specification Development

* Develop design briefs and specifications.
* Integrate health and safety, accessibility, sustainability, and legislative compliance.
* Coordinate design team inputs and monitor programme progress.

## Energy Efficiency and Sustainability

* Undertake energy audits and support carbon reduction strategies.
* Advise on net-zero pathways and implementation of decarbonisation measures.
* Develop proposals that balance environmental and financial outcomes.

## Fire Safety Advisory

* Conduct fire risk assessments and advise on compliance with regulations.
* Review evacuation plans, design intent, and construction details.
* Liaise with statutory bodies where needed.

## CDM and Principal Designer Services

* Deliver the Principal Designer role under the CDM Regulations 2015.
* Coordinate and manage pre-construction information, design risk registers, and CDM documentation.

## Health and Safety

* Ensure ongoing health and safety oversight throughout project stages.
* Conduct audits, advise on risk assessments, and ensure contractor compliance.
* Support training and incident reporting as required.

## Planning and Statutory Consents

* Provide planning strategy advice and prepare submissions.
* Support engagement with local planning authorities and statutory consultees.
* Ensure compliance with all required building and environmental consents.

## Risk and Quality Management

* Develop risk registers and manage risk mitigation throughout delivery.
* Oversee quality assurance and monitor contractor performance.
* Support resolution of defects and post-completion reviews.

## Tender Support

* Draft technical specifications and input to tender documentation.
* Support the evaluation process, including moderation and clarifications.
* Ensure tender processes align with procurement law and University requirements.

## Professional Advice

* Provide responsive, expert advice on construction, estates, legal, and regulatory matters.
* Support strategic decision-making, feasibility studies, and business case development.
* Deliver advice both in written form and through in-person engagement.

# Collaborative Working and Governance

Consultants appointed under this Lot will be expected to work collaboratively with Institutions, fostering openness, knowledge sharing, and joint problem-solving. Core expectations include:

* Engaging constructively with internal client roles, including the Investment Decision Maker (IDM), Senior Responsible Owner (SRO), and Client Project Manager (CPM)
* Supporting cross-functional delivery involving stakeholders from Estates, Procurement, Finance, and Academic departments
* Representing the Institution in communications with contractors, regulators, and external partners
* Supporting post-project reflection, continuous improvement, and knowledge transfer

The appointed Consultant will play an essential role in facilitating communication and trust among all parties, helping to align project outputs with institutional strategy and long-term estate goals.

# Outcomes and Legislative Alignment

Services delivered under this Lot must contribute to the wider public good, in alignment with the **Welsh Procurement Act 2023** and the **Well-being of Future Generations (Wales) Act 2015**. Consultants are expected to demonstrate their contribution to the following outcomes:

* **Public Good**: Supporting social, environmental, and economic value through investment in the built environment
* **Value for Money**: Ensuring that projects are affordable, accountable, and effective
* **Sustainability**: Reducing environmental impact and contributing to carbon targets
* **Fair Work**: Supporting inclusive employment, ethical supply chains, and regional development
* **Transparency and Integrity**: Acting with professionalism, clarity, and fairness in all client relationships

Consultants should be suitably qualified and experienced, with professional accreditations such as RICS, CIOB, RTPI, RIBA or equivalent as appropriate to the services being provided.

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