

UNIVERSITY COLLEGE CORK

Establishment of a Multi Supplier
Framework of Construction
Consultancy Services for Small &
Minor Projects for the Buildings &
Estates Office, UCC

Capital Projects Office

Schedule of Stage Services for
Planning Consultant



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1.0 INTRODUCTION

This Schedule of Services has been developed to ensure that University College Cork (hereinafter called UCC) service requirements for the completion of the commission are clearly understood by the service provider and is mutually agreed between UCC and the service provider.

The schedule has been developed in a generic format to facilitate its use for all UCC capital developments and while the schedule has been developed to be a comprehensive statement of the service requirements of UCC the service provider must ensure that all necessary actions normally required for the completion of the commission are included for in their proposal.

Any conflicts between this Schedule of Services and the partially complete Schedules A & B or any other information issued by UCC should be immediately brought to the attention of Capital Projects Office.

The Capital Projects Office Design Team Procedures apply to all to all design team members, regardless of whether they are part of a single point design team, an integrated design team or directly procured by UCC.

Where the commission relates to a single point design team appointment, the term Integrated Design Team Lead (IDTL) shall be replaced with Design Team Lead, and Integrated Design Team (IDT) with Single Point Design Team.

This document is to be read in conjunction with the following documentation:

- UCC's Capital Projects Office Design Team Procedures,

1.1 CLIENT

For this commission the client is “*University College Cork*”

1.2 CONTRACTUAL ARRANGEMENTS

For this commission the client shall appoint single point design team and Section 1.2.2 below applies. Planning Consultancy Services are a Specialist Skills Provider under the Principal Service Provider of Architectural Services

1.2.1 Integrated Design Team (IDT)

The Client shall appoint an integrated design team (“the Design Team”) comprising of the following principal service providers (PSP).

- Architect and associated specialist skills providers
- Civil & Structural Engineer and associated specialist skills providers
- Mechanical and Electrical Engineer and associated specialist skills providers
- Project Supervisor Design Process.

A principal service providers may be requested to provide a specialist skills provider (SSP), as described in the Suitability Assessment Questionnaire and ITT. A PSP may provide these services as in-house or

engage the services of an external consultant. Where an external consultant is used to provide these services, then the PSP shall enter into a sub-consultancy agreement with their respective specialist service. These agreements are to be furnished to UCC prior to completion of Stage 1. A Collateral Warranty will be completed between the Employer and all sub consultants using model form 2.3 latest revision.

UCC reserves the right to withhold payment of services until the executed Collateral Warranty and Sub-consultant agreements have been received by UCC.

In most cases, the Architect will be nominated as the integrated design team lead (IDTL), however for civil engineering projects, the Civil & Structural Engineer may be nominated as the design team lead and will be clearly defined in the Definitive Project Brief.

Each member of the Integrated Design Team shall enter into a direct contract with the Client under their respective Conditions of Engagement, but all parties shall operate as an Integrated Design Team, collaborating and coordinating their services in accordance with these integrated design team procedures, the relevant schedule of services and all other contract documents.

The IDTL shall also be responsible for coordinating and integrating the work of any other consultants appointed directly by the Employer who are not members of the Integrated Design Team, including but not limited to:

- Quantity Surveyor,
- Carbon Co-ordinator,
- Energy Efficient Designer; or
- Any other such consultants engaged by the Client for the Project.

The IDTL's role in managing these additional consultants shall include:

- Programme and Interface Management: Ensuring alignment of deliverables and design information with the Integrated Design Team,
- Information Coordination: Incorporating their outputs into the overall design and documentation; and
- Communication Management: Acting as the primary point of coordination between such consultants and the Integrated Design Team.

The Integrated Design Team shall collectively adopt and implement an Integrated Working Protocol, covering:

- Agreed procedures for design coordination,
- Common Data Environment (BIM),
- Risk management processes,

- Collaborative decision-making and reporting structures; and
- Regular coordination meetings.

Each integrated design team member remains responsible for the performance of their own services under their Conditions of Engagement, including compliance with Building Control (Amendment) Regulations 2014 and all statutory obligations.

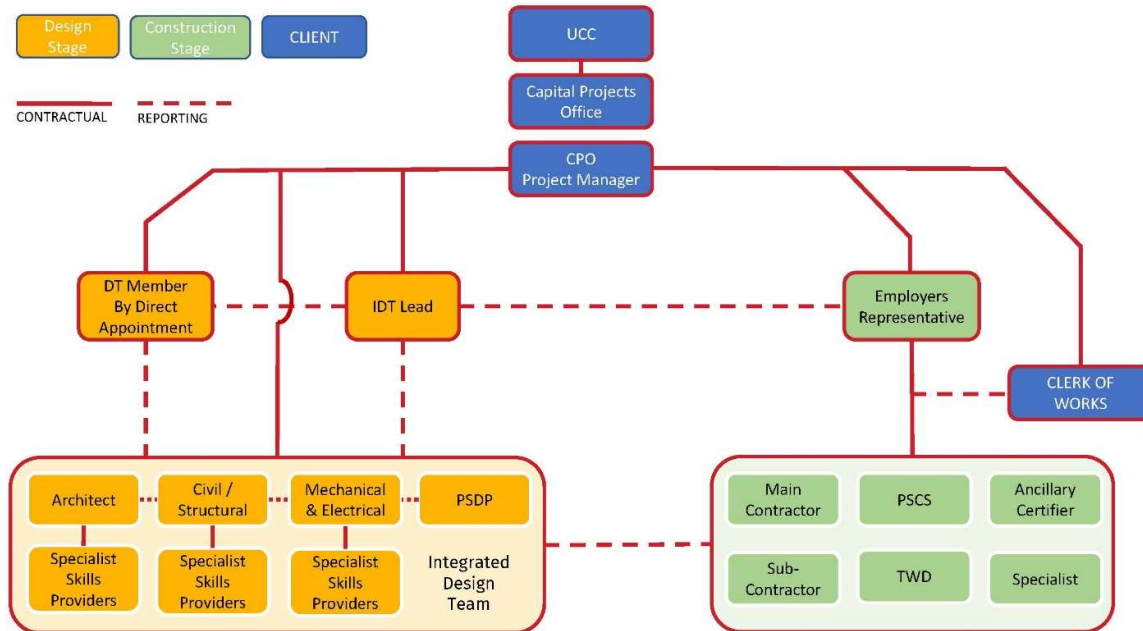


Figure 1.2.1 Integrated Design Team Reporting Structure

1.2.2 Single Point Design (SPDT)

The employer will enter into a contract with the Design Team Leader who is identified as the Architect for this project. The Architect will enter into a sub consultancy agreement with the other consultants i.e. Civil & Structural Engineer, Mechanical & Electrical Engineer, Quantity Surveyor, PSDP, ER, Design Certifier, Assigned Certifier etc.

These agreements are to be furnished to UCC prior to completion of Stage 1. A Collateral Warranty will be completed between the Employer and all sub consultants using model form 2.3 latest revision.

UCC reserves the right to withhold payment of services until the executed Collateral Warranty and Sub-consultant agreements have been received by UCC.

Where identified in the Definitive Project Brief, some disciplines may not form part of the single source provider and shall be procured by direct appointment by UCC. In this instance the Design Team Lead and all other design team members shall accept this discipline as an active member of the overall Design Team.

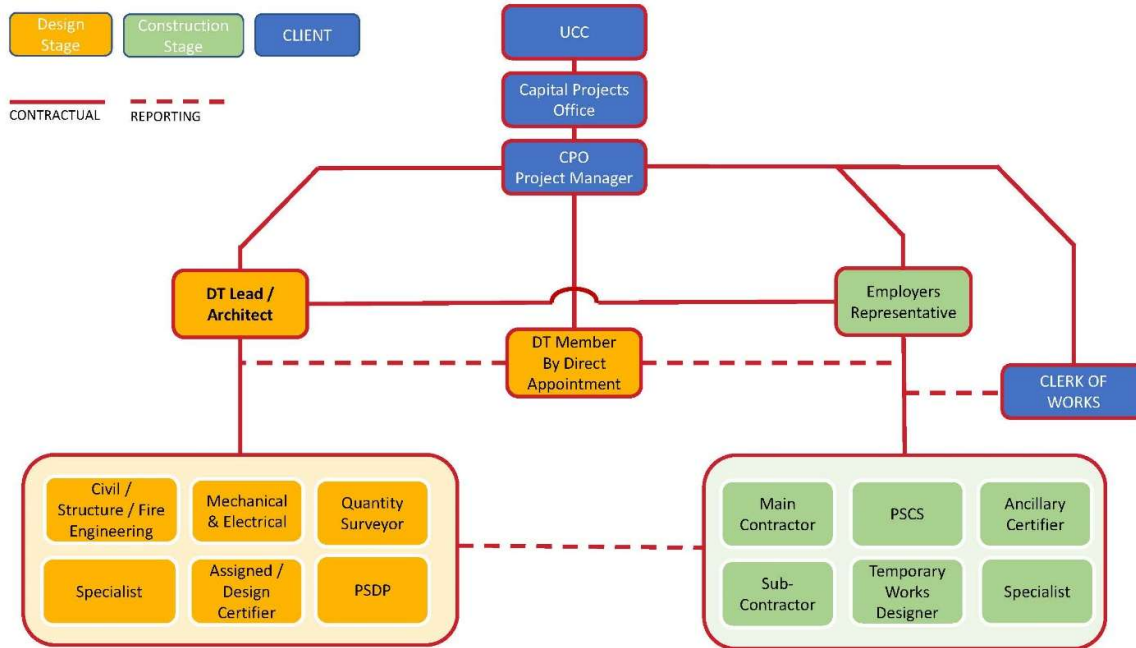


Figure 1.2.2 Single Point Design Team Reporting Structure

1.4 THE SCOPE OF SERVICES

The terms of engagement for consultants is the Department of Finance Conditions of Engagement current at the time of the appointment. (available at <https://constructionprocurement.gov.ie/standard-conditions-of-engagement/>)

The scope of services is as set out in this document and is to be read in conjunction with all other schedule of services for each discipline.

The scope of service includes all work required to design and construct the project in a competent and professional manner (whether expressly stated or not); prepare all documentation and reports required by these procedures; obtain all necessary approvals whether UCC or statutory approvals, all in accordance with the above documents or as otherwise modified by the briefing information. All work required to comply with the Building Control (Amendment) Regulations 2014 is included in the scope of service, including the roles of Design Certifier and Assigned Certifier to be carried out by the Design Team Leader

Consultation with UCC and UCC's end users is an on-going process during the stages and is included as part of the Service. In particular, the service includes for repeat submissions (where required), meetings and such other communications as may be needed to complete the Project or Stage.

The design team is responsible for the printing, reproducing or purchasing of all documents, drawings, maps, photographs and other records for the proper performance of the service.

Delays caused by the main contractor resulting in prolongation of the contract are not a cause for additional fees in accordance with the Conditions of Engagement.

2.0 PROJECT MANAGEMENT AND CO-ORDINATION

2.1 DESIGN TEAM LEADER

The design team leader is the Architect.

The following duties apply to the Design Team Leader (for all Stages) in addition to the duties relevant to his/her professional discipline:

- Overall Management / Co-ordination of Project Stages and Programme including ensuring that any information, communications and/or Stage Submissions are channelled through the Design Team Leader.
- Chair and record Design Team Meetings, Site Meetings, third party and stakeholder meetings as necessary.
- Prepare and submit monthly reports on progress, quality, cost and Health & Safety in relation to the development with the assistance of the other Design Team members in such form as UCC may reasonably require.
- Ensure that the Design Team comply with UCC procedures and SOP's as they may apply to building design and construction to include fully co-ordinated plans, room data sheets and elevations of all rooms.
- Develop and provided fully co-ordinated room data sheets for each room to the level of detail as outlined in examples provided in Appendix A, Room data sheets are to identify and locate all fixture and fittings placed on the walls, floors, ceilings and reflected ceiling plans, but also all fixed and loose furniture. In addition, all M&E equipment within ceiling and wall voids are to be indicated ensuring that access hatches are located such that all necessary plant that needs to be maintained can be easily accessed. The room data sheets are to be extracted from the fully co-ordinated federated BIM model, where BIM is a requirement of the project.
- The Design Team Leader is responsible for reviewing all documentation (from whatever source or discipline), carrying out a quality check on that information and ensuring that all drawings and documents are co-ordinated between the disciplines.
- The Design Team Leader must also ensure effective communications between the relevant DT disciplines, and, where such communications or responses are not effective, implement corrective action including (if required) UCC notification.
- In addition, the Design Team Leader is required to act as Design Certifier and Assigned Certifier in accordance with the requirements of the Building Control (Amendment) Regulations 2014 and the associated Code of Practice for Inspecting and Certifying Buildings and Works.
- The Design Team Leader shall monitor and review the progress of the project in line with the approved project program and budget and shall report any divergences, with recommendations to mitigate any further deviations to the employer. The design team leader in conjunction with design team members shall ensure that inflation is accounted for in their design and budget management.

- The Design Team Leader shall monitor and review the progress and performance of its design team and report any divergences, with recommendations to mitigate any further deviations to the employer.
- The Design Team Leader is also responsible for ensuring compliance with UCC's Schedule of Services, for all disciplines. Refer to the following Schedule of Services for the following roles:
 - Civil & Structural Engineering Services,
 - Fire Engineering Services,
 - Mechanical, Electrical & Process Engineering Services,
 - Quantity Surveying Services,
 - Project Supervisor Design Process (PSDP),
 - Employers Representative,
 - Information Manager (BIM Only),
 - Planning Consultant (Project Specific), and
 - Other Specialist Service Skills Providers (refer to the DPB).
- For the construction period the Design Team Leader will act as UCC's representative in line with schedules A & B of the Standard Conditions of Engagement. The Lead Consultant must ensure that the completed design meets the budgetary requirements. The Lead Consultant must ensure that the completed design of the project fulfils the programme requirements.

2.2 OTHER DESIGN TEAM MEMBERS

The other Design Team members are responsible for all work (relevant to their discipline) required to design and construct the project in a competent and professional manner (whether expressly stated or not).

The other disciplines are required to co-operate with each other and the Design Team Leader and provide (in a timely manner) all information and documentation needed to permit the other disciplines to complete their work.

All Design Team members are also required to review, quality control and co-ordinate all information and Stage documentation with other DT members and ensure compliance with each discipline's UCC's Schedule of Services.

In addition, all Design Team members (with the exception of the Quantity Surveyor), including any sub-consultants that may be employed and relied upon for elements of the design, will be required to provide ancillary certificates for the elements of work for which they are responsible in accordance with the requirements of the Building Control (Amendment) Regulations 2014.

A member of the team will be required to fulfil the role of Employers Representative (ER) for the project in accordance with the requirements of the CWMF. The role of the ER is a dedicated role and the individual must not have any other function (design or otherwise) for the project. The ER can be independent of the other members of the design team i.e. a separate individual or company or can be

chosen from within one of the participating team members. The role of ER should be fulfilled by the same candidate for stages i to v.

3.0 STAGE SERVICES

3.1 STAGE 1 – PRELIMINARY DESIGN

3.1.1 Co-ordination of the Project Stage.

- Obtain written approval from UCC to commence stage.
- Assist in co-ordinating design team members and provide all information as necessary for Stage completion.
- Assist in reviewing, quality control and co-ordinating all information and stage documentation with other Design Team [DT] members and ensure compliance with UCC's Design Team Procedures.
- Provide the UCC appointed Project Manager with sufficient notice for all UCC required approvals, decisions on matters that require any action by UCC, and where appropriate, assist UCC by providing recommendations and options.
- Within one month of appointment, the design team lead shall prepare and submit to UCC a detailed and comprehensive **Responsibility Matrix**, (with contributions from all design team members) which will identify all significant individual and collective responsibilities for the safe and efficient delivery of the project.
- Allow for responding to all UCC queries within 2 days of being requested or sooner if required to maintain contract programme or for urgent matters.

3.1.2 Design Team Meetings and UCC Consultation

- Allow for fortnightly meetings (more if required) for UCC consultations (by Senior or Director) on site including travel time & expenses:
 - initial consultation to review brief and programme or work,
 - prior to developing sketch designs and
 - to discuss and agree draft report.
- Allow for fortnightly Design Team Meetings on site to coincide with UCC meetings.
- Allow for 3+ brainstorming session with the Design Team and UCC.
- Allow for any other meetings as denoted in the meeting matrix and the Definitive Project Brief.
- Allow for 2No. design consultation meetings with the UCC and the End-User groups. A summary Charette exercise will be required. UCC and the End-Users will need a reasonably extensive initial design critique approach in this consultation.
- Include for repeat consultation as above for all material changes to the design or Stage 1 report (other than substantive UCC changes to brief).

3.1.3 Review Brief

- Validate all briefing and supplementary information (from whatever source) including Planning and Project Viability Assessment.
- Detailed review of existing relevant documentation and incorporation of same into reports including final report.
- Review existing UCC Masterplans and Policy Documents relevant to the site.
- Review and report on previous Planning Applications on the site in question.

3.1.4 Preliminary Sketch Designs

- Consult with Local Authority Planning Department at a senior level to review the proposed masterplan and or development.
- Brief DT members on Local Authority Position
- Assist the DT in the development of the Masterplan and / or development
- Advise on Land use planning and zoning for the project.
- Assist DT members in their discussions with the Local Authority Departments with respect to planning issues.
- Assess the impact on any proposed application
- Review the OPW Flood Relief Scheme Consultant with Civil Engineer with respect to any Flooding Implications
- Brief the DT members and UCC on any impact on timelines
- Review of proposed planning drawings and assessment of red and blue line requirements.
- Consultations with DT members and UCC to finalise agreement of red line boundary.
- Prepare and submit draft of main points on challenges, stakeholders and supporting documents.
- Assist with planning applications under Strategic Housing Development (SHD) for Student Accommodation (if relevant).
- Undertake an initial assessment / screening for an Environmental Impact Assessment (EIA) Report.
- Undertake an initial assessment / screening for a Strategic Environmental Assessment (SEA) Report
- When required as part of the planning application; manage, compile and input where required in relation to an Environmental Impact Assessment Report. Identify inputs into report from other consultants. Report to be in accordance with the EPA's "Guidelines on the information to be contained in Environmental Impact Statements" and "Advice Notes on Current Practice" (Additional Fee to be agreed)
- When required as part of the planning application; manage, compile and input where required in relation to a Strategic Environmental Assessment Report. Identify inputs into report from other consultants. " (Additional Fee to be agreed)

- Advice on the local Natura 2000 sites, SAC, NPWS Designated Sites etc as well as any heritage issues that could arise.
- When required as part of the planning application; manage, compile and input where required in relation to an Appropriate Assessment Screening Report (Natura 2000 Sites, NPWS Designation Areas only) Identify inputs into report from other consultants.
- Prepare a planning strategy for each phase of the project through to submission.
 - Consult with DT members and UCC on timeline objectives.
 - Assessment of planning strategy and implications.
 - Briefing to DT members and UCC on planning strategy.

3.1.5 Risk Register

- Within one month of appointment, the design team shall prepare a detailed and comprehensive **Risk Management Plan**, (with contributions from all design team members) which will identify all significant risks associated with the project, analyse / rate the risks, set out proposals to manage the risks and set out plans to review the risks.
- The Design Team shall assist UCC in developing appropriate risk management strategies for dealing with and managing risk throughout all stages of the project. The Risk Management Plan shall examine all risks that could affect the projects safety, cost, programme or quality. Each risk is to be rated and scored, assigned an owner and provided with a mitigation strategy to minimise its impact on the project. The Risk Management Plan shall be updated on a two-monthly basis.

3.1.6 Stage 1 Report (including repeat submissions as required)

- Assist in the co-ordinating, project managing and overseeing the preparation of the Stage 1 Report including the preparation of the Executive Summary in relation to Planning Matters.
- Signed Stage Completion Certificate.

3.1.7 Pre-Stage 1 Stakeholder Meeting

- Attend Pre-Stage 1 Stakeholder Meeting in University College Cork, or an alternative local as chosen by UCC.
- Repeat for each revised Stage 1 submission (if required) resulting from non-compliance by the Design Team as a group with area and cost limits, (excludes substantive UCC changes to the brief).

3.2 STAGE 2A – DEVELOPED DESIGN

3.2.1 Co-ordination of Project Stage

- Co-ordinate design team members and ensure all information as necessary for Stage completion with respect to Planning Application and Submissions.
- Assist in reviewing, quality control and co-ordinating all information and stage documentation with other Design Team [DT] members and ensure compliance with UCC's Design Team Procedures.
- Provide the UCC appointed Project Manager with sufficient notice for all UCC required approvals, decisions on matters that require any action by UCC, and where appropriate, assist UCC by providing recommendations and options.
- Allow for responding to all UCC queries within 2 days of being requested or sooner if required to maintain contract programme or for urgent matters.

3.2.2 Developed Sketch Design

- Develop a planning strategy for each phase of the project through to submission.
 - Consult with DT members and UCC on timeline objectives
 - Assessment of planning strategy and implications
 - Briefing to DT members and UCC on planning strategy.
- Review further assessment of key challenges to obtaining permission
 - Review of relevant planning history to identify planning risks and challenges.
 - Input into the Risk Register with respect to planning risks for the proposed masterplan and / or development.
- Detailed Review of the stakeholders we need to meet prior to submitting a planning application? neighbours, local business, schools, hospital, activists etc
 - Review of potential Stakeholders
 - Prepare list of key bodies to be consulted prior to submitting a planning application.
- Draft formal planning deliverables list supporting documentation will be needed and from whom.
- Map out a programme of engagement leading up to submission of planning application.
 - Consultation with UCC & design team
 - Draft briefing note on programme of engagement leading up to submission. (Time estimate excludes provision for the engagement process itself)
- Attend all meetings as required.
- Internal Reviews with UCC stakeholder.
- Advise on the requirement for phased hand overs and / or enabling work packages.

- Advise on all legal planning matters arising from this stage.
- Meet with UCC End-Users groups as necessary to fine tune and sign off on the design as it progresses.
- Assist in updating and maintaining the risk register.
- Print and Submit to the Local Authority all Planning Documentation as necessary.
- Prepare a Planning Report relevant to the development.
- Prepare a Preliminary Construction Management Plan as necessary, with input from all Design Team members.
- Respond to Further Information Requests as necessary.
 - Provide deliverables list supporting documentation will be needed and from whom to support any Further Information Requests
 - Prepare and submit any documentation as required relevant to Planning Consultancy.
 - Allow for printing and submitting all Further Information Requests to the Planning Authority.
- Undertake an initial assessment / screening for an Environmental Impact Assessment (EIA) Report.
- Undertake an initial assessment / screening for a Strategic Environmental Assessment (SEA) Report
- When required as part of the planning application; manage, compile and input where required in relation to an Environmental Impact Assessment Report. Identify inputs into report from other consultants. Report to be in accordance with the EPA's "Guidelines on the information to be contained in Environmental Impact Statements" and "Advice Notes on Current Practice" (Additional Fee to be agreed)
- When required as part of the planning application; manage, compile and input where required in relation to a Strategic Environmental Assessment Report. Identify inputs into report from other consultants. " (Additional Fee to be agreed)
- Advice on the local Natura 2000 sites, SAC, NPWS Designated Sites etc as well as any heritage issues that could arise.

3.2.3 Design Team Meetings / UCC Consultation

- Allow for fortnightly meetings (more if required) UCC consultations (by Senior or Director) on site including travel time & expenses:
 - Prior to preparation of Stage 2a Report, and
 - To discuss and agree draft report.
- Allow for fortnightly meetings Design Team Meetings on site to coincide with UCC meetings.
- Building in Use Safety Review Workshop with UCC Health and Safety Officer.
- Allow for any other meetings as denoted in the meeting matrix and the Definitive Project Brief.

- Include for repeat consultation as above for all material changes to the design or Stage 2a report (excludes substantive UCC changes to brief).

3.2.4 Stage 2a Report (including repeat submissions as required).

- Planning input into the Stage 2a Report including the preparation of the Executive Summary.
- Prepare Assist the Design Team Lead to fulfil his duties in co-ordination and preparation of the Stage 2a Report.
- Include for amendments (other than for substantive UCC changes to brief) to comply with cost and area limits, and UCC's stated requirements, re-printing and re-submission as required
- Signed Stage Completion Certificate.

3.2.5 Design Stage Review Meeting

- Attend Design Stage review meeting on UCC Campus and allow for repeat Design Stage Review Meeting resulting from non-compliance.

3.3 STAGE 2B – DETAILED DESIGN

3.3.1 Co-ordination of the Project Stage

- Review any implications for the proposed design arising from the Statutory Planning Approvals.
- Allow for responding to all UCC queries within 2 days of being requested or sooner if required to maintain contract programme or for urgent matters.

3.3.2 Design Team Meetings / UCC Consultation

- Allow for any meetings required to discuss the implications for the proposed for the proposed design arising from the Statutory Planning Approvals.

3.3.3 Detailed Design

- Develop scheme as Stage 2a approval (and agreed amendments), including any amendments arising from Statutory Approvals including thorough pre-planning of the building, services and external works.
- Advise on Planning Appeals.
- Advise on Development Contributions