Project and Client Description

Could you please provide the following details about the project which you have chosen to consider.

(Note: Do not disclose any information that must, or you would prefer to, remain confidential)

Project Details:

Project Name: _____ LEARNING RESOURCE CENTRE _____

Project Type: _____

Approx. date of completion: _____ MARCH 1997 _____

Project Size: _____ c £6M _____

Project Status (e.g. one-off, one of a series, etc.): _____ ONE-OFF _____

Site (e.g. green field, already developed, etc.): _____ BROWN FIELD _____

Location (city centre, remote, etc.): _____ CITY CENTRE _____

Relative level of project complexity (i.e. High, Med, Low): _____ HIGH _____

Brief description of any noteworthy project complexities (e.g. risks, construction constraints, innovative design, etc.):

_____ INNOVATIVE DESIGN _____

_____ DIFFICULT ACCESS _____

Client Details:

Client Name/Type: _____ UNIVERSITY _____

Client's in-house resources: _____ PROJECT MANAGEMENT _____

Brief description of client's relevant experience: _____ Estate Management. _____

Relative level of client's quality requirements (i.e. High, Med, Low): _____ High _____

Brief description of client's main quality requirements (e.g. functional, aesthetic, serviceable, etc.):

_____ Functional /aesthetic _____

Brief description of the client's flexibility requirements (i.e. is the client's specification for the project complete or does the client wish to/need to make changes at a later stage?):

_____ Clients spec. was complete. _____

Contract Strategy 1

Organisational Structure (e.g. Traditional, Design-Build, Management Contract, etc.):

Traditional

Type of Tender Process (e.g. competitive 2-stage, negotiated, etc.):

Single stage competitive

Basis of Tender (e.g. full BoQ, drawings and specification, etc.):

BofQ — Firm design.

Pricing Mechanism (e.g. fixed lump sum price, fixed re-measure price, G.M.P. (re-measure) with cost savings/overruns shared equally)

Lump sum

Major Risk allocation (e.g. client retains risk of unforseen adverse ground conditions)

Any noteworthy details about the potential parties who could be employed under this contract strategy (e.g. designer's or contractor's local knowledge, market knowledge, experience, financial capacity, etc.)?

Designers local knowledge based on
previous experience of similar projects.
(Chosen by client following OSEC notice)

Project Element (for definitions see page 1)	COST ESTIMATE (£K)			TIME ESTIMATE (weeks)		
	Min.	Most likely	Max.	Min.	Most likely	Max.
Design		400K		20	26	39
Tender process	500k	60k	720k	8	10	12
Transaction costs		60k		N/A	N/A	N/A
Construction	£5M	£6M	£6.5M	60	65	80

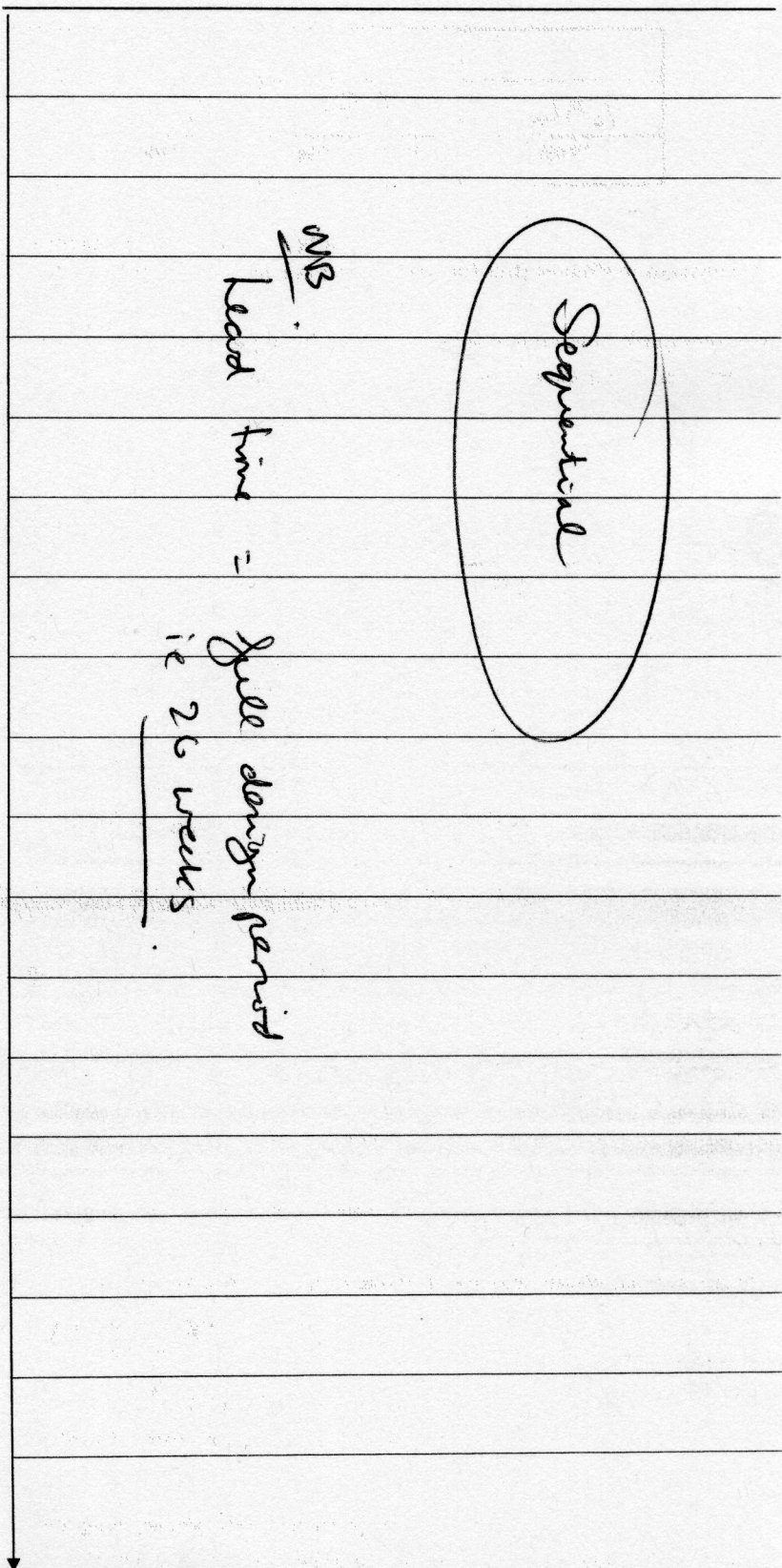## Contractor's mark-up

Note: if the pricing mechanism is a:

- % fee type please estimate a minimum, maximum and most likely % fee value.
- fixed fee type (e.g. cost plus fixed fee) please estimate a minimum, maximum and most likely fixed fee value.
- fixed total price (e.g. fixed lump sum price, fixed re-measured price) please estimate a minimum, maximum and most likely total price.
- target cost type please estimate the relevant parameters (e.g. for a G.M.P. where any cost savings or overruns are shared equally please estimate a minimum, maximum and most likely G.M.P.)

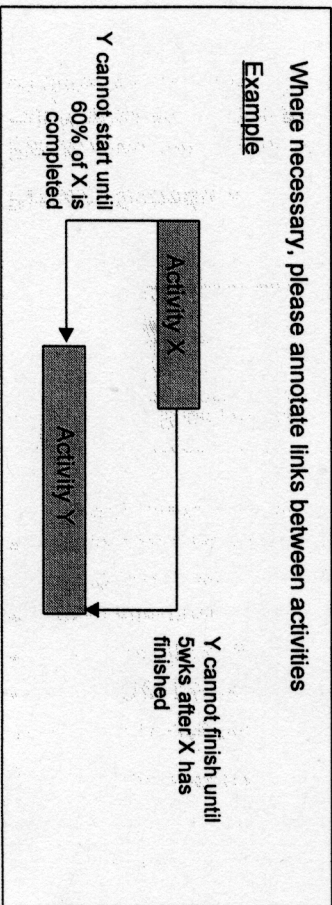| Price parameter	Min.	Most likely	Max.
	0%	5%	7½%

Project Schedule

Please draw the project schedule for this contract strategy on the reverse side of this sheet. You can include as much detail as you feel necessary, but it must at least include the 3 main project activities (i.e. tender, design and construction process). Please use the **most likely** duration estimates as the duration of these activities.

ACTIVITY

Where necessary, please annotate links between activities

Example

Activity X

Activity Y

Y cannot start until
60% of X is
completed

Y cannot finish until
5wks after X has
finished

Sequential

NB.
lead time =
full design period
ie 26 weeks

Time (weeks)
Please calibrate the Time scale

Contract Strategy 2

Organisational Structure (e.g. Traditional, Design-Build, Management Contract, etc.):

Management Contract

Type of Tender Process (e.g. competitive 2-stage, negotiated, etc.):

Competitive   (EC Journal)

Basis of Tender (e.g. full BoQ, drawings and specification, etc.):

Management Fees + Preliminaries

Pricing Mechanism (e.g. fixed lump sum price, fixed re-measure price, G.M.P. (re-measure) with cost savings/overruns shared equally)

JCT '87 Contract

Major Risk allocation (if appropriate)

All on client !

Any noteworthy details about the potential parties who could be employed under this contract strategy (e.g. designer's or contractor's local knowledge, market knowledge, experience, financial capacity, etc.)?

As Strategy 1

Project Element (for definitions see page 1)	COST ESTIMATE (£K)			TIME ESTIMATE (weeks)		
	Min.	Most likely	Max.	Min.	Most likely	Max.
Design		400K			52	
Tender process		100K			40	
Transaction costs		60K		N/A	N/A	N/A
Construction		£6.6M			~~72~~ 60	

Contractor's mark-up
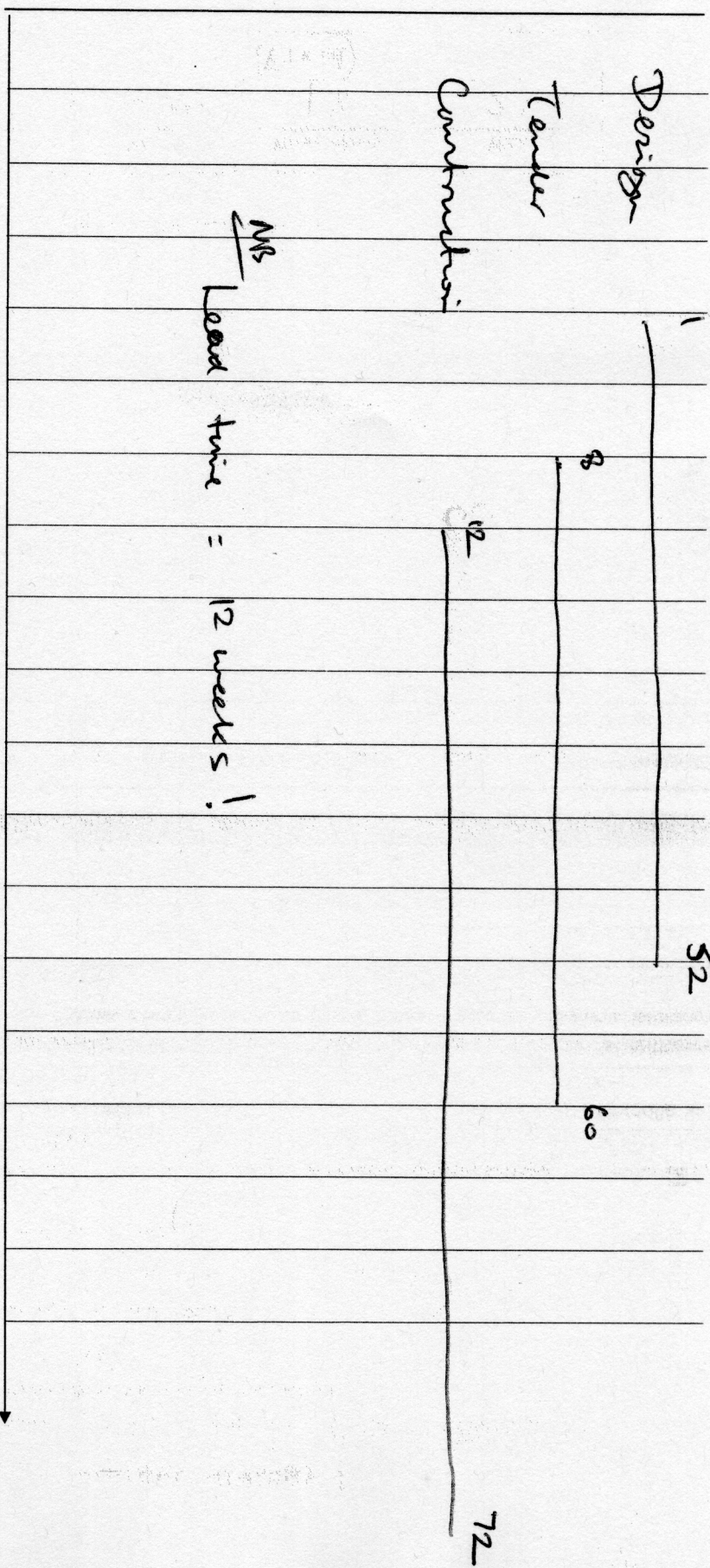
Note: if the pricing mechanism is a:

- % fee type please estimate a minimum, maximum and most likely % fee value.
- fixed fee type (e.g. cost plus fixed fee) please estimate a minimum, maximum and most likely fixed fee value.
- fixed total price (e.g. fixed lump sum price, fixed re-measured price) please estimate a minimum, maximum and most likely total price.
- target cost type please estimate the relevant parameters (e.g. for a G.M.P. where any cost savings or overruns are shared equally please estimate a minimum, maximum and most likely G.M.P.)

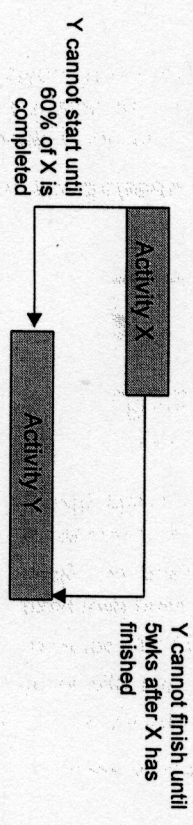| Price parameter	Min.	Most likely	Max.
	0.75% ~~0.5%~~	1%	2½%
		(Fixed)	

Project Schedule

Please draw the project schedule for this contract strategy on the reverse side of this sheet. You can include as much detail as you feel necessary, but it must at least include the 3 main project activities (i.e. tender, design and construction process). Please use the **most likely** duration estimates as the duration of these activities.

Design

Tender

Construction

NB

Lead time = 12 weeks!

8

12

52

60

72

Time (weeks)

Please calibrate the Time scale

Where necessary, please annotate links between activities

Example

Activity X

Activity Y

Y cannot start until
60% of X is
completed

Y cannot finish until
5wks after X has
finished