Dated June 2025

**Liverpool City Region Combined Authority**

**Operating as**

**Merseytravel**

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**Invitation to Tender for**

**The Appointment of an Architect-led project team to develop new** **Combined Control Centre Facility at Wallasey Asset Management Building to completion of RIBA Stage 3 (including D&B Tender documentation) & Technical Advisory Services from RIBA 4 to 7 following appointment of the Contractor**

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# Introduction:

In April 2024, Merseytravel and their appointed consultants undertook a RIBA Stage 0/1 Options Appraisal Study of the existing Asset Management building and developed options for the building to be remodelled to enhance facilities, expand office space and allow existing Police and Tolls and Control Centre provision to be incorporated within a consolidated ‘Combined Control Centre’ (CCC) facility.

The purpose of this commission is to procure an architect-led multidisciplinary consultant design team (Consultant) to develop the preferred option (Option 2) up to the completion of RIBA Stage 3. The Consultant will also produce Design and Build Tender Documents for the procurement of a contractor.

The Consultant is to also include for providing Technical Advisory Services to Merseytravel once a Contractor is appointed. It is envisaged at this stage that the Consultants team should provide relevant and appropriate support across the key significant disciplines as identified in Section 6 of this document and the pricing document for RIBA Stages 4 to 7.

In addition to Architecture, who will undertake a project management role as well being the key point of contact for the client during the proposed design exercise, the disciplines listed below shall also be provided:

* Building structures
* Civil engineering
* Mechanical and electrical engineering and public health (MEP)
* Acoustics
* Fire engineering
* Town planning
* Building control assessor
* Principal Designer – Construction Design and Management Regulations (CDM) and Building Regulations 2022
* Cost consultant
* Carbon management
* Building Information Modelling (BIM)

The above disciplines listed are non-exhaustive and may require adjustment, if necessary, as the proposed design exercise develops into further detail.

Although Merseytravel has selected Option 2 as a preferred option it is expected that upon appointment the successful Consultant conducts a workshop with the client and client stakeholders in order to capture and subsequently implement any comments in relation to the layout and design, prior to developing the design into further detail.

This document sets out the basis for the commission and defines the scope of appointment for the successful Consultant. The works described in the following sections and supporting appendices shall be provided.

# Background Information:

A RIBA stage 0/1 indicative design exercise was undertaken in 2024, assessing existing use and capacity within the Asset Management Building located in Wallasey and investigate opportunities for the internal layout to be reconfigured and refurbished in such a way that it allowed for the consolidation and modernisation of existing functions whilst improving ways of working.

The Asset Management Building is off Gorsey Ln, Wallasey, CH44 4AJ, United Kingdom, located on the approach of the Kingsway Tunnel.

Facilities for consolidation into the remodelled building included Police and Tolls accommodation (which is currently located elsewhere within the Kingsway Tunnel Toll Plaza), and a Police Control Centre (which is currently hosted on a site in central Liverpool).

Two potential options for the Asset Management building were developed through discussions between the client, client stakeholders, and Architect during site visits, workshops and correspondence.

Each of the options encompassed logically arranged improvements to the building, focussing on and encouraging improved ways of working with better and more efficient working practices and technologies. The options also focussed on the improvement of office and welfare facilities.

# Project Objectives:

The project objectives are as follows. The successful consultant will develop the current RIBA Stage 0/1 preferred Option 2 through to completion of RIBA Stage 3, including design and build tender submission documentation, ensuring:

* Police and Tolls are incorporated into a Combined Control Centre facility which improves and consolidates existing Asset Management facilities.
* Remodelled facilities are comfortable and modernise working practices, whilst encouraging staff integration rather than segregation of users.
* The quality of existing and retained interiors are improved through refurbishment, to further encourage an improved working environment.
* Opportunities to further improve spatial efficiency of existing facilities are captured whilst embracing new technology.
* Future maintenance costs are minimised by developing the design in such a way that incorporates appropriate materials/finishes.

In addition to the above requirements the Consultant must:

* Ensure provision of appropriate staff for the various stages of the commission.
* Identify and communicate timescales for implementation of the scheme.
* Endeavour to ensure value for money over the extended life cycle of the existing and remodelled structure.

# Description of the Structure:

It is proposed that the new CCC will be located within the existing Merseytravel Asset Management Offices in Wallasey. This building was constructed in the 1960’s and generally comprises of a steel frame structure on discreet concrete pad foundations with an 8” thick concrete ground bearing slab. The first-floor level is approximately 50% of the existing footprint of the building comprising a 9” deep suspended concrete slab spanning between secondary beams. The roof comprises of steel members and purlins with sky lights along the full length of the building (east to west)

The ground floor currently accommodates a mix of welfare facilities, workshops, garages etc with the first floor comprising offices and welfare facilities.

An asbestos register for the building shall be made available to the successful consultant once appointed.

Existing general arrangements of the current spaces is provided in Appendix G

# Scope of Services:

## Summary of Services

Merseytravel intends to appoint an Architect Led and Project Managed Multi-Disciplined Team (Consultant) to lead the Combined Control Centre remodelling project of the existing Asset Management Building at the Kingsway Plaza in Wallasey including, but not limited to: Architect / Project Manager / Lead Designer, Civil Engineer, Structural Engineer, Principal Designer (CDM and BSA), Mechanical, Electrical and Public Health Engineer, Fire Engineer, Acoustic Consultant, Cost Consultant, Carbon Management Consultant and Town Planning Consultant.

The Consultant will advise Merseytravel of any additional disciplines they identify as required to complete the scope during the tender phase.

The scope is to develop the preferred option (Option 2) up to the completion of RIBA Stage 3. The Consultant will also produce Design and Build Tender Documents for the procurement of a contractor, as well as Technical Advisory Services once the Contractor is appointed for RIBA Stages 4-7.

All design members are to refer to the proposals set out in relation to preferred Option 2 within Appendix B and C as the basis of design development, subject to a workshop with Merseytravel upon commencement to accept and capture any comments on the layout. The Project Brief will then be finalised.

The Consultant shall include provision for an assessment to establish if a Planning Application or any other Statutory Approvals are necessary within the lump sum. In addition, the Consultant shall include a separately itemised allowance for activities necessary to develop and complete Planning Application / Statutory Approval deliverables if it is subsequently determined following appointment that these additional deliverables are required. The Consultant shall design in line with Building Regulations. A design review

against Building Regulations, and any Building Control Statutory Approvals shall be undertaken by the Design and Build contractor following completion of RIBA Stage 3.

## Building Information Modelling (BIM)

The UK governments Construction 2025: Industrial Strategy for construction is targeting lower cost, faster delivery and lower emissions. BIM is aimed at bringing together all of the information about a building within one coordinated model making it possible for any members of a project team or Merseytravel to access data.

The Consultant is expected to have relevant experience in relation to Building Information Modelling (BIM) in accordance with BS EN ISO19650 requirements:

* Model and information production methods and procedures
* Capture of existing asset information
* Information collaboration process
* Common Data Environment (CDE) workflow and design coordination methodology
* Information exchange frequency
* Information check and approval process
* Transmission of files
* Checking and Approval process
* Spatial coordination strategy
* Units of measurement
* Information container breakdown structure

Key roles associated with the management and production of information are required to be assigned to the Consultant BIM team both from a Merseytravel and successful Consultant perspective. This broadly aligns with building information manager and consultant requirements for the project.

The successful Consultant will have the ability to provide suitable BIM management, data and consultancy experience needed for the completion of the BIM tasks.

The successful Consultant will be expected to generate an Employer’s Information Requirements (EIR) document, and then subsequently develop a BIM Execution Plan (BEP) for the use of BIM relevant to each of the proposed RIBA work stages aligned with the requirements of BS EN ISO 19650. The Consultant shall also set up and administer an online common data environment (CDE) such as Autodesk Construction Cloud, to host the 3D information and to provide the whole project team with access for model development

and coordination.

## Architecture

Architecture will be the Lead Designer and Project Manager for the project as well as primary client point of contact. They will lead in coordination of all relevant information required on the project. Architecture will also coordinate assurance of multidiscipline drawing checks, whereas each discipline will be responsible for checking and ensuring that their deliverables convey the information required. Routine Design Team Meetings (DTM’s) will be held at regular intervals.

As project manager, the architect or their nominated person will be responsible for coordinating the design team, developing and controlling the programme, managing the production of deliverables, and meeting liaison requirements with Merseytravel.

### Architecture Deliverables

* During RIBA Stage 2 a Concept Design will be developed for approval by Merseytravel which aligns with the Project Brief. Project Strategies will be developed as well as an Outline Specification.
* During RIBA Stage 3 a Developed Design will be produced to sufficient level of detail for submission of a Planning Application (if required), as well as the issue of tender documentation and drawings to a Design and Build contractor. Drawings will include furniture layouts, room areas, gross internal areas, net internal areas in addition to floor plans, site layout, elevations and sections. Project Strategies and Outline Specification will be further developed.

Generally, during RIBA Stage 2 and 3 the architect will:

* Contribute to, coordinate, and collate end of stage drawing packages and reports.
* Act as lead designer, managing, monitoring designs and coordinating the input of other design consultants and surveyors.
* Attend and participate in design team and Merseytravel meetings as necessary.
* Contribute to the development of the Designer’s Risk Assessment.
* Review the existing and develop a proposed Access and Maintenance Strategy for the remodelled building.
* (If necessary) Meet and consult with local Planning Authority and other relevant statutory authorities, as required. Amend design to reflect comments and feedback received.
* Advise Merseytravel on the extent of Statutory Approvals required, Planning, Building Control etc.
* Work with other consultants to ensure design is coordinated and compatible, amending proposals where appropriate.
* Provide information to the cost consultant to develop the cost plan.
* Produce visualisations/CGI images to represent proposals at each stage.
* Obtain Merseytravel approval to the design proposals showing spatial arrangements, material and appearance prior to submitting any Planning Application (if a planning application is required).
* Obtain the design team’s approval of the type of construction, quality of materials and standard of workmanship for subsequent approval by Merseytravel.
* (If necessary) Prepare Pre-Application information (to include a site and area analysis and 3D massing models) to present to the Local Authority and other relevant statutory authorities.
* (If necessary) On Merseytravel’s instruction, prepare and submit an application for Full Planning Permission.
* Attend Contractor interviews.
* Provide responses to any request for information and technical queries that are received following submission of tender documentation

## Mechanical, Electrical and Public Health (MEP) Engineering

The MEP consultant will review the presented RIBA Stage 0/1 scheme information contained in Appendices A, B and C and produce a summary review report, highlighting commentary on compliance with current Regulations, standards and best practice, and the report will highlight any anticipated issues or gaps relating to MEP services.

The MEP consultant will develop the MEP services design through RIBA Stage 2 and to the completion of RIBA Stage 3. They will liaise with the other disciplines and will be responsible for checking and ensuring that the MEP deliverables convey the information required. Routine Design Team Meetings (DTM’s) will be held at regular intervals.

### MEP Engineering Deliverables

During RIBA Stage 2 and 3 the MEP consultant will:

* Produce a summary review report highlighting commentary on compliance with current Regulations, standards and best practice, identifying MEP-related issues or gaps.
* Review the Employer Information Requirements (EIR) and Building Information Modelling (BIM) Execution Plan (BEP) to inform the level of detail for BIM modelling.
* Produce a ‘concept design’ in line with the requirements of the initial project brief. The deliverables at RIBA Stage 2 will include the following, to evidence items 2.1.1 to 2.9.15 of BSRIA BG6 (2018):
* RIBA 2 report.
* RIBA 2 drawings to the level of detail defined in BSRIA BG6 (2018) including
* Philosophy layouts for all systems
* Schematics
* 2D PDF drawing outputs derived from 3D Revit model.
* Energy strategy report, including a BRUKL document demonstrating compliance with Approved Document L2 (current edition).
* Designer Risk assessment
* MEP access and maintenance strategy
* Concept BIM model
* Produce a ‘developed design’ following on from the RIBA 2 outputs. The deliverables at RIBA Stage 3 will include the following, to evidence items 3.1.1 to 3.9.24 of BSRIA BG6 (2018):
* RIBA 3 report.
* MEP performance specification.
* RIBA 3 drawings to the level of detail defined in BSRIA BG6 (2018) including
* Layouts for all systems (all services drawn in double lines)
* Schematics
* 2D PDF drawing outputs derived from 3D BIM model.
* Energy strategy report, including a BRUKL document demonstrating compliance with Approved Document L2 (current edition).
* Designer Risk assessment updated to align with RIBA 3 design.
* MEP access and maintenance strategy updated to align with RIBA 3 design.
* Developed BIM model.
* Produce input sufficient for the architect to submit a full Planning Permission (if required) and for issue of
* tender documentation and drawings to a Design and Build contractor upon conclusion of RIBA Stage 3.
* Contribute to, coordinate and collate end of stage drawing packages and reports.
* Attend and participate in design team and Merseytravel meetings as necessary.
* (If necessary) Meet and consult with local Planning Authority and other relevant statutory authorities, as required. Amend design to reflect comments and feedback received.
* Advise Merseytravel on the extent of Statutory Approvals required, Planning, Building Control etc. Work with other team members to ensure design is coordinated and compatible, amending proposals where appropriate.
* Provide information to the cost consultant to produce an updated cost plan.

## Civil Engineering

The Civil Engineering consultant will review the presented RIBA Stage 0/1 scheme information contained in Appendices A, B and C and will make the design team aware of high-level requirements on compliance with current standards, design guides and best practice.

The Civil Engineering consultant will develop the design through RIBA Stage 2 and to the completion of RIBA Stage 3. They will liaise with Merseytravel and other disciplines to agree any project specific requirements. The Civil Engineering consultant will be responsible for checking and ensuring that the civils deliverables convey the information required. Routine Design Team Meetings (DTM’s) will be held at regular intervals.

### Civil Engineering deliverables

During RIBA Stage 2 and 3 the Civil Engineering consultant will:

* Provide information for procurement of topographical and utility detection surveys, as required, and subsequently procure and administer the surveys.
* Undertake swept path analysis for all necessary vehicle types showing access and egress to the facility following removal of Door 1, circulation within the facility, and circulation of the hardstanding parking area.
* Review impact on existing road layout and where necessary, make recommendations on any amendments to carriageway, kerb and footway arrangements.
* Review utility information to ensure existing infrastructure and assets are not affected by proposals.
* Review existing drainage arrangement to ensure existing network is not affected by proposals.
* Produce design drawings suitable for RIBA Stage 3 tender showing proposed layout to accommodate access requirements following removal of Door 1, including but not limited to a General Arrangement, pavements, kerbs and footway, drainage, traffic signs and road markings.
* Advise on material specifications for external hard standing areas.
* Input to a Designer Risk Register.
* Obtain Merseytravel’s approval of deliverables for each end of stage submission.
* Provide responses to any request for information and technical queries that are received following submission of tender documentation.

## Building Structures

During RIBA Stage 2 and 3, the Structural Engineer will:

* Develop the design in consideration of the impact to existing structures when reconfiguring and extending the first floor to increase the level of accommodation.
* Develop, review, and assess structural options considering different structural forms, layouts, and materials and provide commentary on this option appraisal within the end of stage reports.
* Develop designs and deliverables through concept design and spatial coordination into a single solution aligned to requirements of this document and coordinated with other disciplines.
* ‘Developed design’ to sufficient level of detail for issue of tender documentation and drawings to a Design and Build Contractor upon conclusion of RIBA Stage 3.
* Define structural design standards and criteria to be used for design including loading, design life, durability, fire resistance, ground movements, thermal movements, tolerances, and serviceability criteria including deflection and vibration criteria.
* Advise Merseytravel on the need for arrangements to be made for any surveys such as geotechnical investigations of the site, including a Geotechnical Investigation Report (GIR) which includes a geotechnical interpretive report to inform design recommendations.
* Provide information for procurement of geotechnical investigations and topographical and dimensional surveys, as required and subsequently procure and administer the surveys.
* Carry out structural surveys to understand the condition of existing structural elements.
* Analyse existing structures to determine the structure’s suitability to achieve the proposed option plan, incorporating repair and/or strengthening works as necessary.
* Develop foundation strategy and coordinate proposals with below ground services.
* Design for load conditions and load combinations based on proposed works and the current knowledge of existing structures.
* Prepare calculations to sufficient detail to facilitate and verify design solutions.
* Prepare sketches, drawings, schedules, specifications, and/or calculations as necessary to convey options and enable the preparation of the cost plan.
* Attend and participate in design team and Merseytravel meetings as necessary.
* Contribute to the construction strategy with consideration of constructability issues and project specific criteria including critical temporary works requirements.
* Contribute to the development of a designer’s health and safety strategy.
* Contribute to the preparation of a brief and tender documentation.
* Prepare detailed proposals for presentation to Merseytravel, drawing attention to any significant differences from the previously agreed requirements.
* Obtain Merseytravel’s approval of deliverables for each end of stage submission.
* Provide responses to any request for information and technical queries that are received following submission of tender documentation.

### Building Structures Deliverables

Deliver RIBA 2, RIBA 3, and Design and Build tender documents including end of stage reports, structural drawings, and specifications. Specifications shall include design / material structural specifications and performance specifications for any Contractor designed items. Structural drawings shall include the following:

* Layout and section drawings of all floor levels indicating structural element sizes and structural zones.
* Typical structural system support and restraint details.
* Details of structural elements and sizes.
* Input to a Designer Risk Register.
* Foundation details and sizes.

## Acoustics

The acoustic consultant will review the presented RIBA Stage 0/1 scheme information contained in Appendix A and will make the design team aware of high-level requirements on compliance with current standards, design guides and best practice.

The acoustic consultant will develop the acoustic design through RIBA Stage 2 and to the completion of RIBA Stage 3. They will liaise with Merseytravel and other disciplines to agree any project specific requirements. The acoustic consultant will be responsible for checking and ensuring that the acoustic deliverables convey the information required. Routine Design Team Meetings (DTM’s) will be held at regular intervals.

### Acoustic Deliverables

During RIBA Stage 2 and 3 the acoustic consultant will:

* Review the design and notify the design team of any non-compliances, with regards to the relevant guidance.
* Determine any specific acoustic requirements for Merseyside Police control room.
* Confirm the principles of the acoustic strategy with the design team.
* Produce Stage 2 outline acoustic strategy report, outlining appropriate acoustic criteria for all proposed spaces and setting out acoustic risks and constraints. Report to be circulated to the client and design team.
* Assist the architects in producing Stage 3 acoustic strategy drawings, highlighting key acoustic criteria.
* Assist the MEP designer in determining appropriate noise limits and other acoustic considerations for heating and ventilation installations.
* Produce the Stage 3 acoustic strategy report providing sufficient information for specifications and detailed design to be developed by others.

## Fire Engineering

The Fire Engineering consultant will review the presented RIBA Stage 0/1 scheme information contained in Appendix A and will make the design team aware of high-level requirements on compliance with current Regulations, standards and best practice.

The Fire Engineering consultant will develop the fire strategy design through RIBA Stage 2 and to the completion of RIBA Stage 3. They will liaise with Merseytravel and other disciplines to agree any project specific requirements. The Fire Engineering consultant will be responsible for checking and ensuring that the Fire Engineering deliverables convey the information required. Routine Design Team Meetings (DTM’s) will be held at regular intervals.

### Fire Engineering Deliverables

During RIBA Stage 2 and 3 the Fire Engineering consultant will:

* Review the design and notify the design team of any non-compliances, with regards to the relevant guidance.
* Confirm the principles of the fire strategy with the design team.
* Produce Stage 2 outline fire strategy report, outlining key fire safety principles and systems and circulate to the client and design team.
* Consult with all relevant approving authorities: building control/approved inspector, fire brigade, insurer and stakeholders as appropriate. Address any concerns they may have and co-ordinate with the design team to ensure that the design is modified as appropriate.
* Assist the architects in producing Stage 3 fire strategy drawings, highlighting key aspects of the fire strategy.
* Produce the Stage 3 fire strategy report providing sufficient information for specifications and detailed design to be developed by others.
* Input to a Designer Risk Register.
* A survey of legacy elements (Walls, Ceilings, Windows, Doors and Floors) to establish what can be utilised and what will need to be replaced for British Standards conformance.

## Town Planning

The Town Planning Consultant will be responsible for confirming and obtaining any planning permission(s) required to deliver the ‘developed design’.

### Town Planning Deliverables

During RIBA Stage 2 and 3 the Planning Consultant will:

* Prepare a Consents Strategy identifying the most appropriate route to consent for the ‘developed design’. This shall include recommendations for the use of any applicable permitted development rights in accordance with the Town and Country Planning (General Permitted Development)(England) Order 2015.

*Permitted Development Route:*

* Prepare a request for pre-application advice (if required) to Wirral Council and lead on discussions.
* Scope, prepare and submit a Lawful Development Certificate application (if required) to Wirral Council, including responding to any queries raised by the planning authority during the course of the process.

*Full Planning Application Route:*

* Prepare a planning programme for securing consent.
* Prepare a request for pre-application advice (if required) to Wirral Council and lead on discussions. Confirmation of the plans and reports required for validation of the forthcoming planning application shall be sought.
* Undertake a review of relevant national and local planning policies for the site and consideration of whether the principle of development aligns with the local development plan.
* Prepare Planning Statement, application form and notices (if required) and collate all other planning submission documentation.
* Prepare and submit an application for full planning permission to Wirral Council including responding to any queries raised by the planning authority during the course of the process.

## Principal Designer

Principal Designer services will be required for both CDM Regulations 2015 and Building Regulations 2022 during RIBA Stage 2-3. The Principal Designer shall be responsible for reporting on compliance with both sets of regulations for all duty holders.

### CDM Regulations 2015

The Principal Designer (CDM) will:

* Discharge duties in accordance with the requirements of Regulations 8, 9, 11 and 12 of CDM 2015
* Create CDM Compliance Strategy
* Support the management of Pre-Construction Information
* Integrate with the design team
* Manage a hazard record
* Issue Pre-Construction Information
* Prepare draft H&S File
* Attend Contractor interviews

### Building Regulations 2022

The Principal Designer (BR) will:

* Comply with all duties in Regulation for non high-risk buildings
* Create BR Compliance Strategy
* Support the management of the Golden Thread including, but not limited to, fire strategy
* Manage Competencies Schedule
* Integrate with the design team
* Manage Compliance Schedule
* Issue Golden Thread
* Prepare information to support Gateway 1 equivalent (planning)
* Prepare information to support Gateway 2 equivalent (building regs planning submission)

## Cost Consultant

The Cost Consultant will review the presented RIBA Stage 0/1 scheme information contained in Appendices A, B and C and produce a cost summary report, highlighting commentary on any financial variances or key areas of financial risk. It will also highlight any anticipated issues or gaps in information that are required to improve cost certainty.

The Cost Consultant will provide a full range of cost management services through RIBA Stage 2 and to the completion of RIBA Stage 3. They will liaise with the other disciplines and make them aware of any potential gaps in their design packs that require further development in order to support the cost exercise. The Cost Consultant will be involved in all Routine Design Team Meetings (DTM’s) which will be held at regular intervals.

### Cost Consultant Deliverables

**General**

* Attend and participate in design team and Merseytravel meetings as necessary.
* Support with development of Procurement and Tendering Strategy if required.
* Advise the Client on any enabling work or similar contracts required before the Building Contract.
* Prepare monthly cost reports. Advise the client of any financial decisions required in a timely manner.
* Liaise with the Professional Team and advise the Client of its obligations under the CDM Regulations.
* Comply with the CDM Regulations in so far as they apply to this appointment.
* Visit the site. Advise the Client on any factors likely to affect cost, time, or method of implementation.
* Advise on the likely effect of market conditions.

**RIBA 2**

* Liaise with the Client and the Professional Team to understand the Clients and develop the Clients Brief.
* Advise on the Cost of the Project. Prepare elemental Cost Plan based on concept design, in accordance with the New Rules of Measurement (NRM 1).
* Provide cost updates during RIBA stage.
* Support with identifying risks and opportunities.
* Support with Value Engineering workshops if required.
* Provide cost estimates for different design options.

**RIBA 3**

* Prepare detailed cost plan in accordance with the New Rules of Measurement (NRM 1 or 2).
* Provide cost updates during RIBA stage.
* Undertake market testing.
* Provide cost input on different material and construction details that align with the budget.
* Support with identifying risks and opportunities.
* Support with Value Engineering workshops if required.
* Liaise with Client Legal Team regarding Contract amendments.
* Work with the project team to collate the tender pack.
* Prepare pricing document for tender pack.
* Work with the Professional Team to prepare the tender Prelims.
* Attend Contractor interviews
* Undertake tender evaluation and prepare commercial tender recommendation report.

## Carbon Management

The successful Consultant is expected to integrate carbon management into the design of the works, in line with the principles of PAS 2080: 2023.

A Carbon Management Plan (CMP) shall be developed to outline how carbon shall be managed across the works. This shall include the following information:

* Approach to integrating carbon into decision-making.
* Methodology and results of whole life carbon assessment.
* Carbon reduction opportunities.
* Whole life carbon reduction target.
* Approach to carbon monitoring and reporting.
* Roles and responsibilities.
* Approach to integrating carbon into procurement.

Upon appointment the successful Consultant shall hold a Carbon Opportunities workshop between key representatives from the project team and Merseytravel to identify opportunities to reduce whole life carbon. All opportunities shall be captured in a register and included within the CMP.

A whole life carbon assessment shall be undertaken, following the principles of PAS 2080 and RICS Whole life carbon assessment for the built environment. The outputs of the assessment shall be documented in a technical note.

## Surveys

Following successful appointment as Consultant, representatives for key disciplines are expected to visit the existing building in order to undertake non-intrusive surveys and visual inspections of the existing building - in order to ensure quality and accuracy of information as it develops.

During the course of the proposed works the successful Consultant will advise Merseytravel on the required scope of any further investigation(s), if identified. Any further investigations will subsequently be procured by Merseytravel.

# Technical Advisory Services (RIBA 4 to 7)

Once a Design & Build Contractor is appointed it is anticipated that the successful Consultant shall be retained to provide Technical Advisory Services across the following disciplines:

* Architecture & Project Management
* Building structures (inc below ground drainage)
* Mechanical and electrical engineering and public health (MEP)
* Acoustics
* Fire engineering
* CDM Advisory Services and Building Regulations 2022
* Cost consultant

It is anticipated that the following multi-discipline services shall be provided by the Consultant during the below RIBA Stages:

## RIBA 4

* Project Manage the Project, including administering of the D&B Contractor Contract (assume to be JCT form of Contract) and chair all contract/progress meetings and produce detailed minutes.
* Applying the expertise of your relevant specialisms, undertake a detailed technical review and assurance of the proposed Contractor Design works information against the RIBA Stage 3 Tender Design providing a detailed technical report detailing the findings of the review. This should include as a minimum:
	1. all material derivations between the Tender Design and the Stage 4 design,
	2. any potential loss of function in the Stage 4 Design,
	3. any potential reduction in longevity in the Stage 4 Design,
	4. any areas where the Stage 4 Design may not satisfy or accord with:
1. the Project Brief,
2. the requirements of the relevant statutory requirements,
	1. Any potential increase in the operational or maintenance costs of the Stage 4 Design (as against the Tender Design)
	2. Any potential reduction in the quality or aesthetics of the Stage 4 Design (as against the Tender Design)
* Following production of the above report provide a formal presentation of the key findings in a meeting to Merseytravel.
* Administer monthly payment applications by the Contractor
* Attend monthly Client Progress Meetings to report on progress and any issues/concerns.
* Provide CDM Advisory services to support the Client during the design phase.

## RIBA 5

* Project Manage the Project, including administering of the D&B Contractor Contract (assume to be JCT form of Contract) and chair all contract/progress meetings and produce detailed minutes.
* Attend monthly Client Progress Meetings to report on progress and any concerns with the works on site
* Undertake site visits as required to ensure the project is delivered as per the agreed design.
* Attend any sites of fabrication and assembly of materials and components to monitor and report on design, quality and workmanship as appropriate.
* Regularly monitor and review any further design development and report against those points A-F in 6.1.
* Undertake snagging/witnessing/commissioning site visits as appropriate at completion of the project
* Confirm in writing that the works have been carried out and completed in accordance with the requirements of the Stage 3 Design.
* Administer monthly payment applications by the Contractor
* Provide CDM Advisory services to support the Client during the Construction phase.
* Provide initial technical support in the event of proposed design changes proposed and advise on the implications of such on the design.

## RIBA 6 & 7

* Project Manage the Project, including administering of the D&B Contractor Contract (assume to be JCT form of Contract) and chair all contract/progress meetings and produce detailed minutes.
* Attend monthly Client Progress Meetings to report on progress and any issues/concerns.
* Support in the satisfactory conclusion/resolution of any snagging and defects works
* Ensure all as built drawings, specifications etc are provided by the Contractor and verify that these accurately capture the works undertaken on site.
* Administer final account of the works
* Provide CDM Advisory services to support the Client during commissioning and handover (including review of O&M Manuals and H&S File).

# Liaison Requirements:

Throughout the commission, the Consultant will be required to liaise as necessary with the assigned Merseytravel officer to source further information, arrange access or discuss requirements as considered appropriate.

Any revisions to the consultant’s brief/scope of services must be approved by Merseytravel prior to any amendments taking place.

The Consultant will also be required to liaise as necessary with all relevant parties, e.g. Tunnels Police/Combine Control Room, Police and Tolls building etc to arrange access, etc.

Following appointment, the Consultant will be required to provide succinct progress reports on a monthly basis, indicating resource returns and outputs towards completion of the services in accordance with the agreed programme and highlighting any issue or activity which has an impact of time, cost or overall risk.

The Consultant shall be responsible for liaison between multi-discipline design team members. Design Team Meetings (DTMs) shall be held regularly.

The Consultant will be required to attend Monthly Progress Meetings with the Merseytravel officer to report on progress and programme of the works, this shall include monthly written progress reports throughout all Stages of the Project (RIBA 2 to 7).

# Programme Requirements:

Within 4 weeks after acceptance of the Consultant’s offer, the successful Consultant will prepare a detailed programme. This programme shall incorporate aspects such as resourcing, design development, coordination, end of stage reports and compilation of material for design and build tender submission as well as actions and milestone. The Consultant shall provide the programme in the form of a Gantt Chart produced as a result of a ‘critical path analysis’. It shall show the level of detail appropriate to each stage of the works and all activities and constraints, each of which shall be given a short title. All events shall be numbered.

The Consultant will then update the programme every 4 weeks until RIBA Stage 3 and the design and build tender submission are completed.

Merseytravel has expressed preference for this stage of the project to be completed within 9 months from inception, excluding any Planning Application(s), Statutory Approvals and subsequent determination period.

# Health & Safety:

The redesign and repurposing of the building must prioritise health and safety by identifying and mitigating foreseeable risks to construction workers, future occupants, and maintenance teams.

Comprehensive pre-construction information should be gathered, ensuring all relevant site details, existing structures, and potential hazards are incorporated into the design process.

Effective collaboration and coordination with designers, contractors (where appropriate at this stage), and stakeholders are essential to integrating robust safety measures throughout the project.

Thoughtful material and design choices must be made to minimise risks and enhance long-term safety, aligning with best practices and regulatory requirements.

Compliance with legal duties, particularly under the Construction (Design and Management) Regulations 2015 (CDM 2015), is crucial, ensuring all duty holders understand their responsibilities and they all maintain appropriate documentation.

Additionally, the design should consider future maintenance, accessibility for Planned Preventative Maintenance and usability, facilitating safe access for repairs, cleaning, and modifications to support ongoing operational needs.

The Consultant shall be responsible for compliance with all current Health and Safety legislation in pursuance of their activities and including those of their employees and subcontractors relating to this Contract.

The Consultant is to prepare appropriate method statements and risk assessments for submission to Merseytravel. Following approval of the Consultant’s method statements and risk assessments, Merseytravel will issue a "Notification of Work". The Consultant must be in possession of this document prior to the commencement of any work on site and at all time during the execution of the work.

All personnel employed by the Consultant who may be required to enter the Site, for whatever reason, shall attend an induction, to be arranged by Merseytravel, at which procedures for accessing and exiting work areas, general conduct on site and emergency procedures will be explained.

The Consultant shall be responsible for ensuring that each person under their control, who may be required to enter the site, for whatever reason, carries a personal identity tag which must show a photograph and name of the bearer and name of that person’s employer. Such cards must be carried at all times while on site. The Consultant shall at all times retain a list of personnel on site and have a communication system in place.

Site safety of sub-contractor’s operatives during the inspection works will be the responsibility of the consultant.

All Consultants’ staff must adhere to the “Merseytravel Local Arrangements for Contractors” document attached as Appendix F and all Health & Safety legislation and Health & Safety recommendations when on Merseytravel’s sites.

There may, during the course of the Consultants works, be other contractors working in the building. The Consultant should be cognisant of this and recognise that further liaison with third parties, including attendance at third party site inductions may be required.

All vehicles used by the Consultant, their employees and sub-contractors, must comply with, and be used in compliance with, all current legislation relating to the use of vehicles on the public highway. If the Consultant wishes to make use of a specialist vehicle that may not comply with the forgoing, prior consent of the Engineer must be obtained before such a vehicle is brought on site. Such consent shall not be unreasonably withheld.

# Planning of the Survey Works

The Consultant is to prepare the following:

Project Plan showing how the Consultant plans to complete the work specified. The Project Plan is a living document to be updated regularly as required by the Consultant and should include the programme.

A Communication Plan defining project stakeholder’s, quality assurance, safety and all other parties that will be involved in executing the project. The Consultant shall agree the method of communicating with all parties, information required, the provider and frequency of communication.

A Quantified Risk Register to hold information on project risks/uncertainties, analysis, countermeasures being applied and status.

The Consultant shall comply with all aspects of the CDM 2015 Regulations in their entirety as required. The Consultant must allocate adequate resources to health and safety, prepare a satisfactory health and safety plan, and supervise the execution of plan.

The Consultant shall comply with all applicable elements in the Merseytravel “Local Arrangements for Contractors” document attached herein as Appendix E. The Consultant shall acknowledge receipt and acceptance of the “Local Arrangements” by completing and returning the “Statement of Contractor” sheet, for the Acknowledgement of Local Arrangements for Contractors Document with the quotation document.

The Consultant shall prepare Method Statements and Risk Assessment and present them to the Engineer for approval/comment, prior to commencement of any visits or survey work on site.

# Social Value

The supplier shall detail what social value outcomes will be delivered through the contract and how these outcomes will be delivered. These outcomes must be measurable and reported on as part of overall contract management.

For this tender, the social value outcomes which could be created include:

* X amount of hours of SME business support provided
* X amount of hours volunteering
* X amount of devices donated to community organisation
* X amount of apprenticeships created
* X amount of hours of skills and career development support sessions delivered in local community asset (school, community centre, church)

# Timescales:

The current anticipated time frames for the project are as follows:

Appointment of an Architect led multidisciplinary design team July 2025

Delivery of RIBA Stage 2 Report October 2025

Delivery of RIBA Stage 3 Report March 2026

Delivery of Design & Build Tender documentation May 2026

Appointment of D&B Contractor September 2026

Delivery of RIBA Stage 4 February 2027

Works start on site (RIBA 5) April 2027

RIBA 6 &7 April 2028.

The Consultant will be required to programme and resource his activities such that these timescales can be achieved.

# Contract Award Criteria

40% Price

60% Quality

Appendix A – Existing drawings and area schedule

Appendix B – Architectural RIBA Stage 0/1 Options Appraisal Report

Appendix C – Architectural RIBA Stage 0/1 Options Appraisal Report - Preferred option (Option 2) drawings and area schedule

Appendix D – Measured survey drawings – existing internal layout

Appendix E Measure survey drawing – surrounding topography

Appendix F – Merseytravel Local Arrangements for Contractors

Please see attached.

Appendix G – Archive drawings of Asset Management Building, Wallasey