

Whitecode Consulting Limited

Merton Council

Merton Schools

MEP Preliminaries

10-06-2025

MEP works within Merton Schools

Contents

PM_10 Project information 1

PM_30 Site, ground and environmental information 2

PM_35 Project performance requirements..... 3

PM_40 Design and approvals information 4

PM_50 Financial and commercial information 8

PM_55 Contract information..... 10

PM_60 Construction management information 13

PM_70 Testing, commissioning and completion information 23

PM_80 Asset management information 27

Ro Roles 28

PM_10 Project information

Project management

PM_10_10_60/10 Project description

1. Project reference: Merton Schools - capital works

PM_10_10_60/30 Project locations

1. Details: As listed in the invitation to tender (ITT)

PM_10_10_60/40 Existing buildings on, or adjacent to the site

1. Details: Sites are all operation educational school sites

PM_10_10_60/60 Access

1. Details: Access to any site is strictly by appointment
2. Limitations: access request must be made via the Contract Administrator.

PM_10_10_60/110 The subcontract work

1. Details: The works as described in the invitation to tender (ITT)

PM_10_20_28/10 Production information

1. Draft version
 - 1.1. Scope: Submit two copies, one may be returned with comments.

Ensure that necessary amendments are made without delay and resubmit unless it is confirmed that it is not required.
 - 1.2. Format: Digital
 - 1.3. Submittal date: 1 week before commencement of works
2. Proposed amendments: Support any request for substitution or variation contained in the production information with relevant details to demonstrate compliance with the specified requirements.
3. Instructions issued during review: If review comments are considered to involve a variation which has not already been acknowledged as such, give notice without delay, and do not proceed until instructed.
4. Matters likely to affect programme: Make reasonable allowance for completing production information, submission (including for CDM purposes), comment, inspection, amendment, resubmission and reinspection.

Ω End of Section

PM_30

Site, ground and environmental information

Site survey information - No Amendments

Ground investigation and survey reports - No Amendments

Environmental information - No Amendments

Hazardous substances information

PM_30_40_06 Asbestos survey report

1. Details: Merton Hold records for each site and contractors should request this before commencement of works

PM_30_40_46 Lead survey report

1. Details: Merton Hold records for each site and contractors should request this before commencement of works

Ω End of Section

PM_35 Project performance requirements

Project management

PM_35_10_25 Durability performance requirements

1. Durability requirements: *Ensure that all MEP, systems and components are suited to the specified function and service conditions in which they are to be installed and made of durable materials*
2. Elements of structure: Design working life of 30 years.

PM_35_30_18 Electrical fire performance requirements

1. Requirements: *All electrical works to comply with BS 7671. All penetration locations to be identified and verified by design team so that any fire-stopping measures can be carried out.*

PM_35_30_85 Structural fire performance requirements

1. Requirement:
2. Methodology: Ensure that the fire performance of any structure is not compromised by your works.

PM_35_50_65 Project and site safety performance requirements

1. Requirement: *Ensure that all aspects of the Construction (Design and Management) Regulations 2015 have been addressed, and that control measures have been put in place to minimize risk and provide a safe and healthy environment within the project.*

PM_35_50_74/10 Safety and protection performance requirements

1. Fire safety
 - 1.1. Use or purpose group: Approved document B2 of the building regulations.
2. Project safety
 - 2.1. Site hazards: The site has live services and only qualified and competent operatives shall undertake works on these services.
 - 2.2. Electrical safety: BS 7671
 - 2.3. Gas Safety: GSIUR regulations.

PM_35_70_94 Ventilation performance requirements

1. Specific room ventilation performance
 - 1.1. Room description: Boiler room where applicable
 - 1.2. Ventilation rate: as BS 6644

Ω End of Section

PM_40

Design and approvals information

Project management

PM_40_20_15 Commissioning strategy

1. **Static testing:** Carry out all testing to relevant standards and offer for the contract administrator to attend and witness.
2. **Commissioning**
 - 2.1. **Commissioning activities:** All systems as per the scope of works.
 - 2.2. **Client training:** Allow to train the site caretaker or use of any system as part of the scope.
3. **Active systems for commissioning:** Low temperature hot water and Hot and cold water systems

PM_40_50_21 Design submittals

1. **Design proposals**
 - 1.1. **Requirement:** Complete any design required to execute the works
 - 1.2. **Submittals:** Schedules, technical information, calculations and manufacturer's literature.
 - 1.3. **Timing:** 7 days before execution of the works
 - 1.4. **Format:** Digital

PM_40_60_05 Activities terminology

1. **Advise:** See 'Communicate'.
2. **Agree:** See 'Communicate'.
3. **Approve:** Record conformance of work to specified criteria by giving formal or official sanction.
4. **Communicate:** Includes advise, inform, agree, confirm, notify, seek, provide or obtain information, consent or instructions, or make arrangements.
5. **Confirm:** See 'Communicate'.
6. **Ease:** Adjust moving parts of designated products, systems or work to achieve free movement and good fit in open and closed positions.
7. **Fix:** Receive, unload, handle, store, protect, place and fasten in position; dispose of waste and surplus packaging; to include labour, materials and site equipment for that purpose.
8. **Give notice:** Communicate in writing to the person administering the contract at the address listed.
9. **Inform:** See 'Communicate'.
10. **Keep for recycling:** As 'Keep for reuse', but relates to a naturally occurring material rather than a manufactured product.
11. **Keep for reuse:** Do not damage designated products, systems or work. Clean off bedding and jointing materials. Stack neatly, adequately protect and store until required by the employer or purchaser, or for use in the works as instructed.
12. **Make good:** Execute local remedial work to designated work. Make secure, sound and neat.
13. **Match existing:** Provide products and work of the same appearance and features as the original, excluding ageing and weathering. Make joints between existing and new work as inconspicuous as possible.
14. **Notify:** See 'Communicate'.
15. **Quote:** Use 'Estimate'.
16. **Recycle:** Collect, sort, process and convert discarded or recovered components into raw materials for use in the creation of new products.
17. **Refix:** Fix previously removed products.

18. **Remove:** Disconnect, dismantle as necessary and take out the designated products or work, together with associated accessories, fixings, supports, linings and bedding materials. Dispose of unwanted materials.

Removal of an item excludes removal and disposing of associated pipework, wiring, ductwork or other services.

Removal of a system includes this work.

19. **Remediate:** Take action or measures to lessen, clean up, remove or mitigate the existence of hazardous materials existing on a property; in accordance with standards, specifications or requirements as may be required by statutes, rules, regulations or specification.
20. **Repair:** Execute remedial work to restore something to its original working state. Make secure, sound and neat.

Excludes redecoration and replacement.

21. **Replace:** Supply and fix new products matching those removed. Execute work to match the original new state of that removed.
22. **Reuse:** Recover complete items to be fixed or used in the project or elsewhere without the requirement for recycling.
23. **Submit:** Deliver in a specified format to a specified person within a specified timeframe.
24. **Submit proposals:** Submit information in response to specified requirements.
25. **Supply and fix:** Supply of products, components or systems to be fixed, together with everything necessary for their fixing.

PM_40_60_23 Description terminology

1. **Attendance:** Includes:

The provision of temporary roads, pavings and paths, standing scaffolding, standing power-operated hoisting plant;

The provision of temporary lighting of an equivalent brightness to the finished lighting brightness;

The provision of water;

The clearing away of rubbish and paying all charges in connection with its disposal, the provision of secure hard standing space for the sub-contractor's own offices, plant and material storage;

The use of standing mess rooms, sanitary accommodation and welfare facilities; and

The provision of all health and safety facilities and all fire safety precautions, services, equipment, signage, facilities, marshals and the like necessary to comply with the relevant parts of the [Joint Fire Code](#).

Additional requirements should be described as 'Special Attendance'.

2. **Building Manual:** A document containing information of use to subsequent building owners, occupiers and users about the requirements and procedures for effective operation, maintenance, decommissioning and demolition of the building.
3. **Construction Work:** Permanent work together with temporary work.
4. **Contractor :** The party who undertakes to perform the services, supply goods or carry out work defined in a contract. Includes main contractor, prime contractor, supplier, service provider, builder, subcontractor, etc. as the context dictates, which may be defined terms in certain standard contract forms.
5. **Contractor's choice:** Selection delegated to the contractor, but liability to remain with the specifier.

6. **Contractor's design:** Design to be carried out or completed by the contractor, supported by appropriate contractual arrangements, to correspond with specified requirements.
7. **Cost:** The amount paid or given by one party to another in exchange for goods, work, supplies or services.
8. **Designer:** A person or organization carrying out design on a project.
9. **Deviation:** Difference between a specified dimension or position and the actual dimension or position.
10. **Drawings:** Definitions as [BSRIA Building Applications Guide: Design framework for building services. 5th edition.](#)
11. **Employer:** The party to the contract for whom the goods, work, supplies or services are provided. Includes client (in consultancy contracts and CDM Regulations), the employer, building owner or purchaser (in construction contracts), the developer (in development agreements and funding agreements), or the 'Main' contractor in contractor/ subcontractor agreements – which may be defined terms in certain standard contract forms.
12. **Estimate:** An approximate evaluation of quantity, number, extent, time or cost of part or the whole of a project.
13. **Execute:** To complete a task fully and put into effect. To fix, apply, install or lay products securely, accurately, plumb and in alignment.
14. **Existing:** Items retained in place to receive new work.
15. **Fastener:** Device for mechanically attaching something to something else.
16. **Manufacturer and Product reference:** Manufacturer – the person or legal entity under whose name or trademark the particular product, component or system is marketed.

Product reference – the proprietary brand name and/ or identifier by which the particular product, component or system is described.

References are as specified in the manufacturer's technical literature current on the date specified.

17. **Manufacturer's standard:** Where used in conjunction with a specified proprietary product, accessories to be those recommended by the product manufacturer.
18. **Permanent Work:** Work to be constructed and completed in accordance with the contract.
19. **Price:** An indication of the amount required to be paid by one party to another in exchange for goods, work, supplies or services.
20. **Product:** Material, both manufactured and naturally occurring, goods and accessories for permanent incorporation into the works.
21. **Requirements:** A description in outline or detailed form of the development, or a part of it, which one party wants another to undertake, design and/ or construct.
22. **Schedule of rates:** The subdivision of product and execution prices by a predetermined unit basis.
23. **Schedule of Work/ Work Schedule:** The subdivision of work items by a predetermined classification. Can form the basis of a pricing document where bills of quantities are not used.
24. **Schematic:** A drawing of a system showing components, products, systems and their interconnections.
25. **Site equipment:** The contractor's apparatus, appliances, machinery, vehicles or things of whatsoever nature required in or about the construction for the execution and completion of the works and the remedying of defects.

Includes appliances, vehicles, consumables, tools, temporary work, scaffolding, cabins and other site facilities.

Excludes: temporary work, employer's products and equipment or anything intended to form or forming part of the permanent works.

26. **Specification:** Written description of requirements.

27. **System:** Products, components, equipment, accessories, controls, supports and ancillary items, including installation, necessary for that section of the work to function.
28. **Temporary work:** Incidental work to undertaken during construction but not intended to form part of the completed work.

Ω End of Section

PM_50

Financial and commercial information

Project management

PM_50_50_30 Tender acceptance criteria

1. **Tender acceptance period:** Tenders must remain open for acceptance, unless previously withdrawn, for a minimum of 13 weeks from the date for return of tender.
2. **Assurance:** Nothing contained in this document or its application should be inferred to guarantee that a tender will be recommended for acceptance or be accepted, or that reasons for non-acceptance will be given.

PM_50_50_35 Tender documents

1. **Tender documents:** As described in the invitation to tender document (ITT)

PM_50_50_45 Tender clarification report

1. **Notification requirements:** As described in the invitation to tender document (ITT)

PM_50_50_50 Tender instruction

1. **Qualifications:** Do not amend or alter documents without written instructions.
2. **Confidentiality:** Do not reveal details of parts of the tender or supporting documents (except for the necessary purposes of preparing that tender) without express written permission.

PM_50_50_50/10 Compliance with tender rules

1. **Compliance:** Failure to comply may result in tenders being rejected at the sole discretion of the employer.
2. **Costs:** No liability is accepted for costs incurred in the preparation of a tender.

PM_50_50_50/20 Pricing

1. **Pricing:** Price and extend each item individually as instructed. Do not group items together.
2. **Currency:** Pounds sterling.

PM_50_50_55 Tender site visit strategy

1. **Nature of the site:** Ascertain before tendering, including access thereto and local conditions and restrictions likely to affect the execution of the work.
2. **Arrangements for visit:** As described in the invitation to tender document (ITT)

PM_50_50_60 Tender return

1. **Tender submission**
 - 1.1. **Destination:** Contract Administrator
 - 1.2. **Time and date:** As described in the invitation to tender document (ITT)
 - 1.3. **Format:** digital
2. **Documents to be included:** As described in the invitation to tender document (ITT)
3. **Inability to tender:** Advise immediately if the work as defined in the tender documents cannot be tendered.

Define those parts, stating reasons for the inability to tender.

PM_50_50_75/10 Error resolution

1. **Arithmetical errors:** Tender price will prevail. An opportunity will be given to confirm the tender or withdraw.
2. **Technical errors:** The tender is deemed to meet or exceed the requirements of the tender documents. Amendment of the tender to reflect this will not constitute a variation, and no claim for additional costs will be accepted.
3. **Corrections:** An endorsement will be added to the priced documents indicating that rates or prices (excluding preliminaries, contingencies, prime cost and provisional sums) inserted therein will be adjusted in the same proportion as the corrected total differs from that stated incorrectly.

PM_50_50_75/20 Error resolution

1. **Arithmetic and technical errors:** The tenderer will be given an opportunity to confirm an offer, or amend it to correct genuine errors. If correction means that the tender is no longer eligible for acceptance under the selected assessment criteria then it will be disqualified from that process.

PM_50_50_90 Tender notification

1. Notification method: via email

Ω End of Section

PM_55 Contract information

Clauses

JCT Intermediate Building Contract with contractor's design (ICD)

- The Contract: JCT Intermediate Building Contract with contractor's design, 2024 edition.
- Requirement: Allow for the obligations, liabilities and services described.

The Recitals

The Works (First Recital)

- The Works comprise: As detailed in the scope of works.
- Location of the works: Merton primary school as indicated within the scope of works.

Contractor's designed portion (Second Recital)

- The Works include the design and construction of: MEP systems as listed within the scope of works

Contract drawings (Third Recital)

- Contract drawings: Information as listed in the MEP section

Other documents supplied by the Employer (Fourth Recital)

- Documents: 1.1 Additional Conditions of Contract for Construction Contracts
- Named person: The whole of the text referring to a named person as a subcontractor will not be deleted. The whole of the text referring to a named person as a subcontractor will be deleted.

Pricing by the Contractor (Fifth Recital - (A))

- Pricing by the Contractor: Option A will apply and Option B will be deleted.
- Priced document: Work schedules.
- Priced Activity Schedule: The words 'and has provided the Employer with a priced schedule of activities annexed to this Contract (the Activity Schedule)' will be deleted.

Articles

Architect/ Contract Administrator (Article 3)

- Architect/ Contract Administrator: Alex Hill

Principal Designer (Article 5)

- Principal Designer: Alex Hill

Contract particulars

Contractor's Proposals (Sixth Recital)

- Contractor's Proposals: Required.
- Specific Requirements: Provide proposals 1 week before works commence for approval.

CDM Regulations (Tenth Recital)

- The project: Is notifiable.

Arbitration (Article 8)

- Article 8 and clauses 9.3 to 9.8: Apply.

Date for Completion of the Works (Clause 1.1)

- Date for completion of the Works: As the invitation to tender letter

Rectification period (Clause 2.30)

- Period: three months

Advance payment and advance payment bond (Clause 4.7)

- Advance payment: Clause 4.6 does not apply.

Interim payments – Interim valuation dates (Clause 4.8.1)

- The first Interim Valuation Date: 1 week after commencement onsite.
- Subsequent dates: The same date in each month or the nearest business day in that month.

Listed items – not uniquely identified (Clause 4.10.5)

- Listed items – not uniquely identified: This entry in the contract particulars will be deleted.

Contractor's Public Liability insurance – injury to persons or property (Clause 6.4.1)

- Insurance cover (for any one occurrence or series of occurrences arising out of one event): 5 million

Joint Fire Code (Clause 6.15)

- The Joint Fire Code: Does not apply.

Contractor's Design Portion – Professional Indemnity Insurance (Clause 6.19)

- Level of cover
 - Indemnity required: Relates to claims or series of claims arising out of one event.
 - Amount: 1 million
- Cover for pollution and contamination claims: Is not required.
- CDP Professional Indemnity Insurance

Adjudication (Clause 9.2.1)

- The Adjudicator: to be appointed by nominated body
- Nominating body – where no adjudicator is named or where the named adjudicator is unwilling or unable to act (whenever that is established): The Royal Institution of Chartered Surveyors.

Arbitration (Clause 9.4.1)

- Appointor of Arbitrator (and of any replacement): President or a Vice President of the Chartered Institute of Arbitrators.

Conditions - No Amendments

Section 1 (Definitions and Interpretation) - No Amendments

Section 2 (Carrying out the Works) - No Amendments

Section 3 (Control of the Works) - No Amendments

Section 4 (Payment) - No Amendments

Section 5 (Variations) - No Amendments

Section 6 (Injury, Damage and Insurance) - No Amendments

Section 7 (Assignment and Collateral Warranties) - No Amendments

Section 8 (Termination) - No Amendments

Section 9 (Settlement of Disputes) - No Amendments

Ω End of Section

PM_60

Construction management information

Project management

PM_60_10_65/10 Health and safety information

1. **Content:** Describe the proposed organization and resources to safeguard the health and safety of operatives, including those of subcontractors, and of any person whom the works may affect.
2. **Include**
 - 2.1. **Policy document:** A copy of the contractor's health and safety policy documents, including risk assessment procedures.
 - 2.2. **Records:** Accident and sickness records for the past five years and of any previous Health and Safety Executive enforcement action.
 - 2.3. **Training:** Records of training and training policy.
 - 2.4. **Personnel:** The proposed number and type of staff responsible for health and safety on this project with details of their qualifications and duties.
3. **Submittal date:** before commencement

PM_60_10_75/20 Traffic and vehicles

1. **Limitations:** Parking must be coordinated with the site caretaker, including for any deliveries.

PM_60_10_75/30 Storage, accommodation, mechanical plant, temporary works and services

1. **Position:** Submit proposed details of intended siting.
2. **Maintenance:** Alter, adapt and move as necessary. Remove when no longer required and make good.

PM_60_10_83/110 Beneficial use of installed systems

1. **Permanent systems that may be used for the Works**
 - 1.1. **Permanent systems:** Electrical. Heating. Mechanical. Ventilation.
2. **Condition of use**
 - 2.1. **Generally:** Do not use for any purpose other than running in, testing and commissioning.

PM_60_20_79/20 Setting out records

1. **Record drawings:** Include details of grid lines, setting-out stations, benchmarks and profiles. Retain on site throughout the contract, and hand over on completion.

PM_60_30_13/20 Commissioning programme

1. **Submittal date:** 1 week before works commence
2. **Format:** digital

PM_60_30_19/40 Method statements

1. **Method statements:** Prepare describing how and when the following procedures are to be carried out.
2. **Submittal date:** Within one week of request.

PM_60_30_20/20 Programme

1. **Master programme:** When requested, and before starting work on site, submit a master programme for the works in an approved form.
2. **Include**
 - 2.1. **Planning:** Planning and mobilization by the contractor including subcontractor's work.
 - 2.2. **Engineering services:** Running in, adjustment, commissioning and testing of engineering services and installations.
 - 2.3. **Instructions:** Work resulting from instructions issued in regard to the expenditure of provisional sums.
 - 2.4. **Concurrent work:** Work by others and concurrent with the contract. The nature and scope of which, the relationship with preceding and following work and relevant limitations are suitably defined in the contract documents.
3. **Number of copies:** One copy.
4. **Submittal date:** before contract start

PM_60_30_45/50 Existing structures

1. **Duty:** Check proposed methods of work for effects on adjacent structures inside and outside the site boundary.
2. **Supports**
 - 2.1. **Standards:** In accordance with [BS 5975](#) and [BS EN 12812](#).
 - 2.2. **Requirements:** Provide and maintain incidental shoring, strutting, needling and other supports as may be necessary to preserve stability of existing structures on the site or adjoining, which may be endangered or affected by the works.

Do not remove until new work is strong enough to support existing structure.

Prevent overstressing of completed work when removing supports.

3. **Adjacent structures:** Monitor and immediately report excessive movement.

PM_60_30_45/100 Use or disposal of materials

1. **Specific limitations:** Do not use the school bins and provide you own disposal method

PM_60_30_57 Notice of commencement

1. **Notice period (minimum):** 7 days

PM_60_40_40/100 Ownership of products

1. **Ownership:** At the time of each valuation, supply details of those products not incorporated into the works which are subject to reservation of title inconsistent with passing of property as required by the conditions of contract, together with their respective values.
2. **Evidence:** When requested, provide evidence of freedom of reservation of title.

PM_60_50_63/100 Schedule of rates

1. **Schedule of rates (unpriced):** Provided. The contractor may insert additional items. Fully price all items.

PM_60_60_26/40 Noise and vibration

1. **Noise control:** In accordance with [BS 5228-1](#).
2. **Equipment:** Fit compressors, percussion tools and vehicles with effective silencers of a type recommended by manufacturers of the compressors, tools or vehicles.

3. **Restrictions:** Obtain consent before using percussion tools and other noisy appliances.

Do not use radios or other audio equipment or permit employees to use in ways or at times that may cause nuisance.

PM_60_60_26/60 Pollution

1. **Prevention:** Protect the site, the works and the general environment including the atmosphere, land and water courses against pollution.
2. **Contamination:** If pollution occurs inform immediately, including to the appropriate authorities and provide relevant information.

PM_60_60_26/120 Nuisance

1. **Duty:** Prevent nuisance from smoke, noise, dust, rubbish, vermin and other causes.
2. **Surface water:** Prevent hazardous build-up on site, in excavations and to surrounding areas and roads.

PM_60_60_26/130 Asbestos-containing materials

1. **Requirement:** Report immediately suspected materials discovered during execution of the works. Do not disturb and agree methods for safe removal or encapsulation.

PM_60_60_26/190 Waste

1. **Waste:** Includes rubbish, debris, spoil, containers and packaging, and surplus material requiring disposal.
2. **Requirement:** Minimize production and prevent accumulation of waste. Keep the site and works clean and tidy. Clean out voids and cavities in the construction before closing.
3. **Disposal:** Collect and store in suitable containers. Remove from site and dispose of in a safe and competent manner, as approved and directed by the Waste Regulation Authority.
4. **Recyclable material:** Sort and dispose at a materials recycling facility approved by the Waste Regulation Authority.
5. **Documentation:** Retain on site.

PM_60_60_40/10 Insurance

1. **Documentary evidence:** Before starting work on site submit details and/ or policies and receipts for the insurances required by the conditions of contract.

PM_60_60_40/90 Professional indemnity insurance

1. **Requirement:** Provide and maintain PI insurance in respect of contractor designed work.
2. **Level of cover:** Relates to claims or series of claims arising out of one event.
3. **Amount of indemnity required:** 1 Million
4. **Sub-limits of cover**
 - 4.1. **Pollution and contamination claims**
 - 4.1.1. **Level of indemnity:** Each and every claim
5. **Expiry of required period of CDP Professional Indemnity Insurance:** Six years.
6. **Documentary evidence:** Details and/ or policies and receipts for the insurances required.
7. **Submittal date:** Before starting work on site.

PM_60_60_40/110 Insurance claims

1. **Notice:** If an event occurs which may give rise to a claim or proceeding in respect of loss or damage to the works or injury or damage to persons or property arising out of the works,

immediately give notice to the employer/ client, the person administering the contract on their behalf and the insurers.

2. **Failure to notify:** Indemnify the employer/ client against loss, which may be caused by failure to give such notice.

PM_60_60_60/10 Removal or replacement of existing work

1. **Extent and location:** Agree before commencement.
2. **Execution:** Carry out in ways that minimize the extent of work.

PM_60_60_60/20 Ownership of materials

1. **Alteration or clearance work:** Materials arising become the property of the contractor except where otherwise stated. Remove from site as work proceeds.

PM_60_60_60/30 Measurement

1. **Covered work:** Give notice before covering work required to be measured.

PM_60_60_60/40 Service runs

1. **General:** Provide adequate space and support for services, including unobstructed routes and fixings.
2. **Ducts, chases and holes:** Form during construction rather than cut in situ.
3. **Coordination with other works:** Submit details of locations, types and methods of fixing of services to fabric and identification of runs and fittings.

PM_60_60_60/50 Security

1. **Protection:** Safeguard the site, the works, products, materials, and existing buildings affected by the works from damage and theft.
2. **Access:** Take reasonable precautions to prevent unauthorized access to the site, the works and adjoining property.

PM_60_60_60/70 Stability

1. **Responsibility:** Maintain the stability and structural integrity of the works and adjacent structures during the contract.
2. **Design loads:** Obtain details, support as necessary and prevent overloading.

PM_60_60_60/80 Occupied premises

1. **Extent:** Existing buildings will be occupied and/ or used during the contract.
2. **Details:** The school may have summer clubs or events outside of term time
3. **Works:** Carry out without undue inconvenience and nuisance and without danger to occupants and users.
4. **Overtime:** If compliance with this clause requires certain operations to be carried out during overtime, and such overtime is not required for any other reason, the extra cost will be paid to the contractor, provided that such overtime is authorized in advance.

PM_60_60_60/100 Occupier's rules and regulations

1. **Occupier's rules and regulations:** Comply.
2. **Details**
 - 2.1. **Location:**
 - 2.2. **Arrangements for inspection:**

PM_60_60_60/110 Mobile telephones and portable electronic equipment

1. **Restricted area:** Photograph may not be taken in occupied areas without consent of the school

PM_60_60_75/50 Fire prevention

1. **Requirement:** Prevent personal injury or death, and damage to the works or other property from fire.
2. **Standard:** Comply with the [Joint Fire Code: Fire Prevention on Construction Sites](#).

PM_60_60_75/60 Smoking on site

1. **Smoking on site:** Not permitted.

PM_60_60_75/70 Burning on site

1. **Burning on site:** Not permitted.

PM_60_60_75/100 Electromagnetic interference

1. **Duty:** Prevent excessive electromagnetic disturbance to other susceptible apparatus.

PM_60_60_75/120 Laser equipment

1. **Construction laser equipment:** Install, use and store in accordance with [BS EN 60825-1](#) and the manufacturer's instructions.
2. **Class 1 or Class 2 laser equipment:** Ensure laser beam is not set at eye level and is terminated at the end of its useful path.
3. **Class 3R and Class 3B laser equipment:** Do not use without approval and subject to submission of a method statement on its safe use.

PM_60_60_75/150 Existing features

1. **Protection:** Prevent damage to existing buildings, fences, gates, walls, roads, paved areas and other site features which are to remain in position during execution of the works.

PM_60_60_75/160 Existing work

1. **Protection:** Prevent damage to existing work, structures or other property during the execution of the works.
2. **Removal:** Minimum amount necessary.
3. **Replacement work:** To match existing.

PM_60_60_75/170 Building interiors

1. **Protection:** Prevent damage from exposure to the environment, including weather, flora, fauna and other causes of material degradation during the execution of the works.

PM_60_60_75/180 Existing furniture, fittings and equipment

1. **Protection:** Prevent damage or move as necessary to enable the works to be executed. Reinstall in original positions.
2. **Removal by employer/ client**
 - 2.1. **Timing:** Before work starts in relevant areas.

PM_60_60_78 Site waste management plan

1. **Details:** Produce a plan of how waste for this site is to be managed.
2. **Format:** Electronic.

3. **Provision:** Available for inspection.
4. **Development**
 - 4.1. **Responsibility:** contractor
 - 4.2. **Content:** Identity of proposed principal contractor.

Location of the site.

Description of the project.

Estimated project cost.

Types and quantities of waste that will be generated.

Resource management options for these wastes, including proposals for minimization, reuse and/ or recycling.

The use of appropriate and licensed waste management contractors.

Record keeping procedures.

Waste auditing protocols.

- 4.3. **Submittal date:** Within one week of request.

PM_60_70_17/10 Outline construction phase health and safety plan

1. **Content**
 - 1.1. **Risk assessment:** Method statements on how risk from hazards identified in the pre-construction information and other hazards identified by the contractor will be addressed. Procedures for carrying out risk assessment and for managing and controlling the risk.
 - 1.2. **Management system:** Details of the proposed management structure, responsibilities and arrangements for issuing health and safety directions. Include procedures for informing other contractors and employees of health and safety hazards.
 - 1.3. **Selection:** Proposed procedure for ensuring competency of other contractors, the self-employed and designers.
 - 1.4. **Communication:** Procedures for communications between the project team, other contractors and site operatives. Include arrangements for cooperation and coordination between contractors.
 - 1.5. **Emergency:** Procedures including those for fire prevention and escape.
 - 1.6. **Records:** Arrangements for ensuring that accidents, illness and dangerous occurrences are recorded.
 - 1.7. **Personnel :** Procedures for ensuring that persons on site have received relevant health and safety information and training. Include arrangements for consulting with and taking the views of people on site, for preparing site rules and drawing them to the attention of those affected and ensuring compliance.
 - 1.8. **Monitoring:** Monitoring procedures to ensure compliance with site rules, selection and management procedures, health and safety standards and statutory requirements. Review procedures to obtain feedback.
2. **Submittal date:** Within one week of request.

PM_60_70_17/20 Construction phase health and safety plan

1. **Delivery to the Client:** No later than one week before commencement on site.
2. **Confirmation:** Do not start construction work until written confirmation is received that the construction phase health and safety plan includes the procedures and arrangements required by the [Construction \(Design and Management\) Regulations](#).

3. **Content:** Develop the plan from and draw on the outline construction phase health and safety plan and the pre-construction information.

PM_60_70_25/10 Health and safety hazards

1. **Limitations:** The nature and condition of the site and/ or buildings cannot be fully ascertained before they are opened up.
2. **Information:** The accuracy and sufficiency of this information is not guaranteed. Ascertain if additional information is required to ensure the safety of persons and the works.
3. **Training:** Ensure that all relevant personnel are aware of the hazards listed and have received appropriate training to deal with them.

PM_60_70_40/20 Health and safety information

1. **Content:** Describe the proposed organization and resources to safeguard the health and safety of operatives, including those of subcontractors, and of any person whom the works may affect.
2. **Include**
 - 2.1. **Policy document:** A copy of the contractor's health and safety policy documents, including risk assessment procedures.
 - 2.2. **Records:** Accident and sickness records for the past five years and of any previous Health and Safety Executive enforcement action.
 - 2.3. **Training:** Records of training and training policy.
 - 2.4. **Personnel :** The proposed number and type of staff responsible for health and safety on this project with details of their qualifications and duties.
3. **Submittal date:** Within one week of request.

PM_60_70_75/10 Supervision

1. **Requirement:** The whole of the contract work and any significant parts must be under the close control of competent trade supervisors to ensure maintenance of satisfactory quality, progress and coordination.
2. **Evidence:** Submit, including: details of the person proposed; their relevant skills, training and knowledge; practical experience; qualifications; membership or registration with professional bodies; employment history; work-related assessments; and management structure.
3. **Submittal date:** One week before start on site.
4. **Replacement of supervisory personnel:** Give maximum possible notice before changing supervisory personnel.

PM_60_90_40/10 Safety provisions for site visits

1. **Access:** Provide at reasonable times.
2. **Inspections:** Agree dates and times several days in advance, to enable affected parties to be present.
3. **Safety:** Submit details in advance of safety provisions and procedures (including those relating to materials, which may be deleterious) which will require compliance when visiting the site.
4. **Protective clothing and/ or equipment:** Provide and maintain on site for visitors to the site.

PM_60_90_40/30 Inspections

1. **Standard:** Inspection, or other action, of products or executions must not be taken as approval, unless confirmed in writing and including: date of inspection; part of the work inspected; respects or characteristics which are approved; extent and purpose of the approval; and associated conditions.

PM_60_90_70/20 Substitution of products

1. **Products:** If an alternative product to that specified is proposed, obtain approval before ordering the product.
2. **Reasons:** Submit reasons and relevant information for the proposed substitution.
3. **Information to be submitted:** Manufacturer and product reference.

Cost.

Availability.

Relevant standards.

Performance.

Function.

Compatibility of accessories.

Proposed revisions to drawings and specification.

Compatibility with adjacent work.

Appearance.

Copy of warranty or guarantee.

4. **Alterations to adjacent work:** If needed, provide details of scope, nature and cost.
5. **Manufacturers' guarantees:** If substitution is accepted, submit before ordering products.

PM_60_90_70/30 Equivalent products

1. **Inadvertent omission:** Wherever products are specified by proprietary name, the phrase 'or equivalent' is deemed to be included.

PM_60_90_70/40 Substitution of standards

1. **Specification:** To British Standard or European Standard.
2. **Substitution:** May be proposed, complying with a grade or category within a national standard of another Member State of the European Community, or an International Standard recognized in the UK.
3. **Ordering:** Submit notification of all such substitutions before ordering.
4. **Documentary evidence:** Submit for verification when requested. Submitted foreign language documents must be accompanied by certified translations into English.

PM_60_90_70/60 Currency of documents

1. **Currency:** References to published documents are to the editions, including amendments and revisions, current on the date of the invitation to tender.

PM_60_90_70/70 Sizes

1. **General dimensions:** Products are specified by their coordinating sizes.
2. **Timber:** Cross section dimensions shown on drawings are:

Target sizes as defined in [BS EN 336](#) for structural softwood and hardwood sections.

Finished sizes for non-structural softwood or hardwood sawn and further processed sections.

PM_60_90_70/80 Incomplete documentation

1. **Products and executions:** Where and to the extent that products or executions are not fully documented, they are to be as follows.
2. **Requirements**
 - 2.1. **Standard:** Of a kind and quality appropriate to the nature and character of the part of the works where they will be used.
 - 2.2. **Suitability:** Suitable for the purposes stated or to be reasonably inferred from the project documents.
3. **Contract documents:** Omissions or errors in description and/ or quantity shall not vitiate the contract, nor discharge any obligations or liabilities under it.

PM_60_90_70/90 Workmanship skills

1. **Operatives:** Appropriately skilled and experienced for the type and quality of work.
2. **Registration:** With Construction Skills Certification Scheme.
3. **Evidence:** Operatives must produce evidence of skills and qualifications when requested.

PM_60_90_70/130 Quality of products

1. **Generally:** New.
2. **Supply:** Each product from the same source or manufacturer.
3. **Quantity:** Whole quantity of each product required to complete the works is to be of consistent kind, size, quality and overall appearance.
4. **Tolerances:** Where critical, measure a sufficient quantity to determine compliance.
5. **Deterioration:** Prevent. Order in suitable quantities to a programme and use in appropriate sequence.
6. **Recycling:** Proposals for recycled products may be considered.

PM_60_90_70/220 Quality of execution

1. **Generally:** Fix, apply, install or lay products securely, accurately, plumb, neatly and in alignment.
2. **Colour batching:** Do not use different colour batches where they can be seen together.
3. **Dimensions:** Check on site.
4. **Finished work:** Not defective, damaged, disfigured, dirty, faulty or out of tolerance.
5. **Appearance :** Adjust joints open to view so that they are even and regular.

PM_60_90_70/280 Approval of products

1. **Programme:** Undertake or arrange submissions, samples, inspections and tests to suit the works programme.
2. **Approval:** Relates to a sample of the product and not to the product as used in the works. Do not confirm orders or use the product until approval of the sample has been obtained.
3. **Complying sample:** Retain on site in good, clean condition. Remove when no longer required.

PM_60_90_70/290 Approval of execution

1. **Programme:** Undertake or arrange submissions, samples, inspections and tests to suit the works programme.
2. **Approval:** Relates to the stated characteristics of the sample. (If approval of the finished work as a whole is required, this is specified separately.) Do not conceal or proceed with affected work until compliance with requirements is confirmed.
3. **Complying sample:** Retain on site in good, clean condition. Remove when no longer required.

PM_60_90_70/320 Appearance and fit

1. **Tolerances and dimensions:** If likely to be critical to execution or difficult to achieve, as early as possible either:

submit proposals; or

arrange for inspection of appearance of relevant aspects of partially finished work.
2. **General tolerances (maximum):** To [BS 5606](#), Tables 1 and 2.

Ω End of Section

PM_70

Testing, commissioning and completion information

Project management

PM_70_15 Compliance and certification documents

1. **Proprietary products:** Retain on site evidence that the proprietary product specified has been supplied.
2. **Performance specification:** Submit upon request, evidence of compliance with performance specifications, including test reports indicating properties tested, pass or fail criteria, test methods and procedures, test results, identity of testing agency, test dates and times, identities of witnesses and analysis of results.

PM_70_15/10 Services regulations

1. **Services:** New and existing services must comply with the by-laws or regulations of the relevant statutory authority.

PM_70_15/20 Water regulations and byelaws notification

1. **Requirements:** Notify water undertaker of work carried out to, or which affects, new or existing services. Submit required plans, diagrams and details.
2. **Consent:** Allow adequate time to receive undertaker's consent before starting work. Inform immediately if consent is withheld or is granted subject to significant conditions.

PM_70_15/40 Water regulations and byelaws – contractor's certificate

1. **Content**
 - 1.1. **Installation:** Describe the new installation and/ or the work carried out to an existing installation, including the address.
 - 1.2. **Statement:** Confirm that the installation complies with the relevant water regulations or by-laws.
 - 1.3. **Inspection:** Provide the contractor's name and address, the name and signature of the individual responsible for checking compliance and the date on which the installation was checked.
2. **Submit:** Certificate on completion of the work, include a copy to the water undertaker.

PM_70_15/50 Electrical installation certificate

1. **Certification:** The original certificate is to be lodged in the Building Manual at the completion of relevant electrical work.

PM_70_15/60 Gas, oil and solid fuel appliance installation certificate

1. **Content**
 - 1.1. **Installation:** Describe the new installation and/ or the work carried out to an existing installation, including the address.
 - 1.2. **Safety:** Include special recommendations or instructions for the safe use and operation of appliances and flues.
 - 1.3. **Statement:** Confirm that the installation complies with the appropriate safety, installation and use regulations.
 - 1.4. **Inspection:** Provide the contractor's name and address, the date on which the installation was checked and the name, qualifications and signature of the competent person responsible for checking compliance.
2. **Submit:** Before the completion date stated in the contract.

PM_70_80 Commissioning information

1. **General:** Submit relevant drawings and preliminary performance data to enable users to become familiar with the installation.
2. **Submittal date:** At commencement of commissioning.

PM_70_85_10/130 Content of the building manual

1. **General:** Details of the property, the parties, fire safety strategy, operational requirements and constraints of a general nature.
2. **Building fabric:** Design criteria, maintenance details, product details, and environmental and trafficking conditions.
3. **Building services:** Description and operation of systems, diagrammatic drawings, record drawings, identification of services, product details, equipment settings, maintenance schedules, consumable items, spares and emergency procedures.
4. **Documentation:** Guarantees, warranties, maintenance agreements, test certificates and reports.

PM_70_85_10/140 Presentation of building manual

1. **Format:**
2. **Selected drawings :** Where these are needed to illustrate or locate items mentioned in the manual: if larger than A4, to be folded and accommodated in the binders so that they may be unfolded without being detached from the rings.
3. **As-built/ record drawings:** The main sets may form annexes to the manual.
4. **Number of hard copies:**

PM_70_85_20 Defects rectification report

1. **Non-compliant items**
 - 1.1. **Opening up, inspection, testing, making good, adjustment of the Contract Sum, or removal and re-execution:** Submit proposals
 - 1.2. **Submittal date:** As soon as possible after discovery of items which are, or appear to be, non-compliant.
2. **Acceptability:** Such proposals may be unacceptable, and contrary instructions may be issued.

PM_70_85_20/30 Measures to establish acceptability

1. **General:** Wherever inspection or testing shows that the work, materials or goods are not in accordance with the contract, and measures (e.g. testing, opening up, experimental making good) are taken to help in establishing whether or not the work is acceptable, such measures will be at the expense of the contractor, and will not be considered as grounds for revision of the completion date.

PM_70_85_30/10 Tests and inspection schedule

1. **Timing:** Agree and record dates and times of tests and inspections to enable affected parties to be represented.
2. **Confirmation:** Provide one working day prior to each test or inspection. If sample or test is not ready, agree a new date and time.
3. **Records:** Submit a copy of test certificates and retain copies on site.

PM_70_85_35/100 Work before completion

1. **General:** Make good damage consequent upon the works. Remove temporary markings, coverings and protective wrappings unless otherwise instructed.
2. **Cleaning:** Clean the works thoroughly inside and out, including accessible ducts and voids. Remove splashes, deposits, efflorescence, rubbish and surplus materials.

3. **Cleaning materials and methods:** As recommended by manufacturers of products being cleaned, and must not damage or disfigure other materials or construction.
4. **COSHH dated data sheets:** Obtain for materials used for cleaning and ensure they are used only as recommended by their manufacturers.
5. **Minor faults:** Touch up in newly painted work, carefully matching colour and brushing out edges. Repaint badly marked areas back to suitable breaks or junctions.
6. **Moving parts of new work:** Adjust, ease and lubricate as necessary to ensure easy and efficient operation, including doors, windows, drawers, ironmongery, appliances, valves and controls.
7. **Security at completion**
 - 7.1. **General:** Leave the works secure with accesses closed and locked, where appropriate.
 - 7.2. **Keys:** Account for and adequately label keys. Hand over to the duly authorized person with an itemized schedule. Retain a duplicate schedule signed by that person as a receipt.

PM_70_85_40/20 The health and safety file

1. **Responsibility for production:** The contractor.
2. **Content:** All systems which form part of the scope
3. **Latest date for submission:** Completion of the works

PM_70_85_45/10 Tools and consumables

1. **General:** Provide tools and portable indicating instruments for the operation and maintenance of all services plant and equipment (except any installed under named subcontracts) together with suitable means of identifying, storing and securing.
2. **Quantity:** Two complete sets.
3. **Consumables:** Supply a complete list of all consumables necessary for the operation.
4. **Submittal date:** At completion.

PM_70_85_45/20 Schedule for spare parts

1. **General:** Prepare a priced schedule of recommended spare parts that should be obtained and kept in stock for maintenance of the services installations.
2. **Content:** Include in the priced schedule for:

Manufacturers' current prices, including packaging and delivery to site.

Checking receipts, marking and numbering in accordance with the schedule of spare parts.

Referencing to the plant and equipment list in part 3 of the building manual.

Painting, greasing, etc. and packing to prevent deterioration during storage.

PM_70_85_52/10 Manufacturer's recommendations and instructions

1. **General:** Comply with manufacturer's printed recommendations and instructions current on the date of the invitation to tender.
2. **Exceptions:** Submit details of changes to recommendations or instructions.
3. **Execution:** Use ancillary products and accessories supplied or recommended by main product manufacturer.
4. **Products:** Comply with limitations, recommendations and requirements of relevant valid certificates.

PM_70_85_64/20 Mechanical and electrical services

1. **Final tests and commissioning:** Carry out so that services are in full working order at completion of the works.

2. **Confirmation:** Provide a Building Regulations notice, signed by a suitably qualified person, to Building Control, confirming that systems have been commissioned in accordance with approved procedures.
3. **Records:** Include in the building manual.

PM_70_85_64/40 Continuity of thermal insulation

1. **Record and report**
 - 1.1. **Conformity:** Confirm that work to new, renovated or upgraded thermal elements has been carried out to conform to the specification.
 - 1.2. **Content:** Address of premises, the contractor's name and address, the name, qualification and signature of a competent person responsible for checking compliance and the date on which the installation was checked.
2. **Submit:** Before completion of the works.
3. **Copy:** Include in the building manual.

PM_70_85_90/10 Training

1. **Objective:** Before completion, explain and demonstrate to designated maintenance staff the purpose, function and operation of the installations including items and procedures listed in the building manual.

PM_70_85_96 Works completion certificate

1. **Requirement:** Give notice of the anticipated dates of completion of the whole or parts of the works.
2. **Associated work:** Ensure necessary access, and that services and facilities are complete.

PM_70_90/10 Record drawings and information

1. **Record drawings**
 - 1.1. **Drawings scope:** MEP systems included as part of the scope
 - 1.2. **Drawings format:** digital
2. **Record specification**
 - 2.1. **Specification format:** BSRIA
 - 2.2. **Submittal date:** on handover

PM_70_90/20 Technical information

1. **Availability:** Retain on site for reference by supervisory personnel.
2. **Information:** Manufacturer's current information and relevant British Standards, relating to products to be used in the works.

Ω End of Section

PM_80

Asset management information

Project management

PM_80_10_50 Maintenance requirements

1. **Scope:** Provide a comprehensive maintenance service. Include all planned preventative maintenance, as set out within the maintenance schedule and replacement of all consumable items.
2. **Plant and equipment to be maintained:** All newly installed plant
3. **Terms:** Provide all maintenance to maintain the warranties of all plant newly installed
4. **Commencement:** At Practical completion
5. **Duration:** 12 months

PM_80_10_50/10 Maintenance instructions and guarantees

1. **Components and equipment:** Obtain or retain copies, register with the manufacturer and hand over on or before completion of the works.
2. **Information location:** In the Operating and maintenance manual for the site
3. **Emergency call-out services**
 - 3.1. **Telephone numbers:** Provide for use after completion.
 - 3.2. **Extent of cover:** Office hours only. Office hours only. Office hours only.

Ω End of Section

Ro Roles

Roles

Ro_10_20_14 Client

1. Name: Merton Council
2. Address: Merton Civic Centre, London Rd, Morden SM4 5DX

Delivery team roles

Ro_30_10_19 Contract administrator

1. Name: Whitecode Consulting Ltd
2. Address: 26-27 The Hill, Northfleet DA11 9EU
3. Contact: Alex Hill
4. Email address: alex.hill@whitecode.co.uk

Ro_30_10_27 Employer's agent

1. Name: Whitecode Consulting Ltd
2. Address: 26-27 The Hill, Northfleet DA11 9EU
3. Contact: Alex Hill
4. Email address: alex.hill@whitecode.co.uk

Official roles - No Amendments

Design roles

Ro_50_20_54 Mechanical services engineer

1. Name: Whitecode Consulting Ltd
2. Address: 26 -27 The Hill, Northfleet DA11 9EU
3. Contact: Alex Hill
4. Email address: alex.hill@whitecode.co.uk

Ω End of Section



Specification created using NBS Chorus