

Newcastle University Lift Consultancy Specification.
Scope of Services for Lift Consultancy
(Rev A 24.11.16 See Item 3.1.12)

1. Project Management.

- 1.1. Refurbishment/Renewal projects and New Installations shall be managed in accordance with the criteria listed in items 2 and 3 below.
- 1.2. Consultants engaged on renewal/refurbishment projects shall be directly employed by the University.
- 1.3. Consultants engaged on installation projects shall be directly employed by the university throughout the lifetime of the project.
- 1.4. Consultants shall use the attached generic specification as a guideline for lift design. Over the period of the Consultancy Contract the consultant shall advise and recommend to the University items that should be added to the document.
- 1.5. At all times the consultant shall specify proprietary lift installations that are intended to provide the University with efficiency, reliability and longevity of service.

2. Lift Refurbishment. Consultant Project Management.

2.1. Pre Lift Contractor Appointment.

- 2.1.1. Attend site and carry out detailed survey of lift installation.
- 2.1.2. Identify all services provisions and interfaces.
- 2.1.3. Provide estimated cost of project with breakdown of all aspects i.e. builders work, strip out, lift installation, electrical works, contingency sum, maintenance, etc.
- 2.1.4. Arrange a detailed Site Specific lift specification compliant to all relevant legislation scheduling all building and services works and with the lift contractor specified as a Main Contractor with regard to CDM Regulations.
- 2.1.5. If a BREEAM rating is required, the consultant will be required to provide analysis of lift specification options for the BREEAM assessment.
- 2.1.6. As necessary, at both pre and post lift contractor appointment stages, seek advice from, and liaise with, University-appointed structural engineer on such matters as loadings of proposed lift plant and alterations that may be necessary for DDA compliance.

(Any project that requires major structural considerations such as extension to upper floors may be subject to additional fees).
- 2.1.7. Arrange and issue all tender documentation to the University for despatch including technical schedules; production schedules; site programmes; schedules of rates; form of tender and summary of tender sum (Up to five tenderers may be required for any specific project). Tenders shall be opened by the University.
- 2.1.8. Manage all tender queries and site visits from contractors.
- 2.1.9. Act as Principal Designer including, make F10 Notifications where necessary, Producing Pre tender H&S information, assessing all contractors' method statements and risk assessments. Monitor compliance by contractor on site. Ensure assembly of H&S File upon completion.

- 2.1.10. Assess tender returns, liaising as required with tenderers to address omissions and errors.
- 2.1.11. Provide tender assessment report to S.O. complete with analysis of tenders and recommendations for appointment of contractor.

2.2. Post Lift Contractor Appointment.

- 2.2.1. Review and comment contractor's project drawings leading to approval of same.
- 2.2.2. Arrange and chair pre-start and progress meetings such as are necessary for each individual project. Prepare and issue minutes of meetings.
- 2.2.3. Carry out regular site visits and inspect progress of project. Address any areas of concern to contractor both verbally and in writing and report findings to SO.
- 2.2.4. Be available to attend site as required to address any queries, coordination problems, working issues the lift contractor or employer may raise (at short notice if required).
- 2.2.5. Undertake a complete witnessed test to the relevant standard and carry out detailed snagging of completed project and report outstanding issues to contractor and SO. Check completion of all snagging items.
- 2.2.6. Obtain quotations for any variations and issue variation instructions to contractor.
- 2.2.7. Approve and certify all staged and final payments. Certify the final account figure.
- 2.2.8. Check all certification; as installed drawings and schematic diagrams; maintenance manual content etc.
- 2.2.9. Arrange the first year's PM schedule within the tender documentation and carry out regular site visits checks during this period to ensure full compliance by the contractor.
- 2.2.10. Scrutinise first year's insurance inspectors reports (2 No) and resolve resulting recommendations by liaising with the surveyor and contractor as necessary.
- 2.2.11. Carry out lift installation inspection during latter part of guarantee period. Address any areas of concern to the contractor in writing and report findings to SO. Ensure outstanding issues are fully addressed and corrected.
- 2.2.12. The entire project management package shall be inclusive of all expenses relating to the above requirements.

Owing to funding arrangements or site access restrictions Refurbishment/Renewal projects may be split such that item 2.1 is carried out separately and item 2.2 is carried out a later date. In such circumstances the consultant's fee will be split accordingly at a 40:60 ratio.

3. New Lift Installation. Consultant Project Management.

3.1. Pre Lift Contractor Appointment.

Prior to the main contractor appointment, work with the project design team and carry out the following duties:

- 3.1.1. Attend site and carry out detailed survey of lift installation.
- 3.1.2. Identify all services provisions and interfaces required for the installation of a new or the refurbishment of an existing lift.
- 3.1.3. Attend where necessary project design team meetings (organised by the architect) to ensure that

the lift type & installation requirements are correctly specified & co-ordinated with the main design.

- 3.1.4. Provide estimated cost of project with breakdown of all aspects i.e. builders work, strip out, lift installation, electrical works, contingency sum, maintenance, etc.
- 3.1.5. Liaising with the client appointed design team produce a detailed Site Specific lift specification compliant to all relevant legislation scheduling all building and services works required. This document will be inserted into the main contractor tender documentation.
- 3.1.6. If a BREEAM rating is required, the consultant will be required to provide analysis of lift specification options for the BREEAM assessment.
- 3.1.7. As necessary, at both pre and post lift contractor appointment stages, seek advice from, and liaise with, University-appointed structural engineer on such matters as loadings of proposed lift plant and alterations that may be necessary for DDA compliance.
- 3.1.8. Assist in resolving lift installer tender queries be available for site visits that the lift contractors may request during the tender period.
- 3.1.9. Co-operate with the project Principle Designer including , regarding F10 Notifications, Producing Pre tender H&S information, assessing all contractors' method statements and risk assessments, monitor compliance by contractor on site & ensure assembly of H&S File upon completion.
- 3.1.10. Assess tender returns, liaising as required with tenderers to address omissions and errors.
- 3.1.11. Provide tender assessment report to S.O. and project architect complete with analysis of tenders and recommendations for appointment of lift contractor.
- 3.1.12 Beneficial Use. For lift installations that are part of larger building project the lift consultant shall specify that the lift contractor will within his tendered sum allow for an agreed period of "Beneficial Use" that includes all comprehensive maintenance and an extended guarantee period.
 - The lifts shall be maintained on a caretaker basis until building handover , providing beneficial use of the lifts for the equipping of the building.
 - Protection of the lift car finishes during beneficial use shall be at the cost of the Main Contractor
 - Following beneficial use by the Main Contractor the lifts shall be inspected and all or any damage to finishes shall be made 'as new' .
 - The Defects Liability Period for the Client shall not commence until the building is handed over the University therefore an extended warranty period shall be agreed with the Main Contractor to suit the building equipment program.
 - The Lift Contractor shall maintain the lifts for a period of 12 months, concurrent with the 12 months Defects Liability Period, under a fully comprehensive maintenance contract as detailed in this specification to achieve the GUARANTEED response times to entrapments without sub contracting call backs or out of hours service.

3.2. Post Lift Contractor Appointment.

Once the main contractor has been appointed by the University carry out the following duties:

- 3.2.1. Where changes occur to the lift contractors proposals (post contractor appointment) review and comment on the contractor's detailed project specific drawings & specification.
- 3.2.2. Attend project progress meetings such as are necessary for each individual project. Also attend specific pre-start & progress lift contractor meetings.
- 3.2.3. Carry out regular site visits and inspect progress of project. Address any areas of concern to contractor both verbally and in writing and report findings to SO.
- 3.2.4. Be available to attend site as required to address any queries, coordination problems, working issues the lift contractor or employer may raise (at short notice if required).
- 3.2.5. Undertake a complete witnessed test to the relevant standard and carry out detailed snagging of completed project and report outstanding issues to contractor and SO. Check completion of all snagging items.
- 3.2.6. Comment upon change quotations/proposals for any variations linked to the installation of the lift.
- 3.2.7. Check all certification; as installed drawings and schematic diagrams; maintenance manual content etc.
- 3.2.8. Arrange the first year's PM schedule within the tender documentation and carry out regular site visits checks during this period to ensure full compliance by the contractor.
- 3.2.9. Scrutinise first year's insurance inspectors reports (2 No) and resolve resulting recommendations by liaising with the surveyor and contractor as necessary.
- 3.2.10. Carry out lift installation inspection during latter part of guarantee period. Address any areas of concern to the contractor in writing and report findings to SO. Ensure outstanding issues are fully addressed and corrected.
- 3.2.11. The entire project management package shall be inclusive of all expenses relating to the above requirements.

New Lift Installation projects will be arranged such that project management is carried out in the two distinct phases described above (items 3.1 and 3.2) with the consultant's fee being split accordingly at a 40:60 ratio.

