Feasibility Study for the Redevelopment of Cheltenham Crematorium

Feasibility Report

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1.0 Introduction

Robert Potter & Partners LLP (RPP), Chartered Architects and Project Managers, were engaged by Cheltenham Borough Council on 26th March 2015 to undertake a Feasibility Study into replacement of the existing cremator plant and recommendations on how to improve the facilities and services on the site, specifically in relation to financial and environmental performance, to meet projected future demand.

RPP have completed four crematorium projects throughout the UK, including new-build and the extension of existing facilities. These projects have included wider cremators to accommodate larger coffins (bariatric cremators) and abatement plant.

RPP engaged Pick Everard to provide construction cost estimates and Classic Cremation Partnerships Ltd to provide input on the business case.

Previous studies commissioned by Cheltenham Borough Council in October 2013 (PJ Combustion Solutions Limited) and September 2014 (Stopher Associates Limited) identified serious failings in the existing cremator plant, which are causing an ongoing maintenance burden and an unsatisfactory working environment, together with the fact that the abatement plant cannot be made operational due to inherent failings in the abatement system.

In additional to the replacement of the cremators, service improvement aspirations include:

- Better vehicular access arrangements
- Increased parking capacity
- Better waiting facilities
- Better access to floral tributes

The existing crematorium has Grade II Listed Building status and the cemetery is on the register of parks and gardens of Special Historic Interest. The feasibility study has been prepared with reference to the Statement of Significance dated January 2015 which was undertaken by Justin Ayton for Cheltenham Borough Council.

This Feasibility Study Report records the process which has been undertaken to obtain an understanding of the existing facility and its environs, to establish the aspirations for improvements and enhancements of the existing service, to develop the options appraisal to explore and test potential strategies, to consult and review the emerging options, to select strategies which are operationally appropriate, and to assess the financial, ecological, sustainable and contextual implications of these in order to prepare an appropriate recommendation.

2.0 Executive Summary

The options appraisal identified 8 potential strategies, together with variations thereof totalling 18 potential approaches. These explored the potential for reuse of the existing building, extension of the existing building, new build within the existing crematorium grounds (including the area identified as the nursery), new build on adjacent ground outwith the crematorium site, remote crematory options, together with opportunities for improvement of the vehicular circulation, pedestrian circulation, car parking provision, floral tribute enhancements, and, where possible, other related improvements and potential for medium and long term expansion in the future.

The exhaustive options review identified four potential options:-

Option B: Minimal solution, focusing on replacement of existing cremator plant (2 cremators), installation of abatement plant, new floral tribute area, improved vehicular and pedestrian circulation, and new car park to accommodate 120 cars.

Option C: Remote crematory to accommodate two cremators, with potential for third cremator, together with abatement plant, expansion of South Chapel into vacated crematory to accommodate 152 seated mourners, new floral tribute area, improved vehicular and pedestrian circulation, and new car park to accommodate 120 cars.

Option D: Remodelling of existing crematory and extension to accommodate two cremators, with potential for third cremator, together with abatement plant, extension of North Chapel to accommodate 133 seated mourners plus overspill for large funerals, enhanced waiting areas, enhanced staff facilities, general improvements to functionality, new floral tribute area, improved vehicular and pedestrian circulation, and new car park to accommodate 120 cars.

Option E: New-build option on land to the east of the site, providing a new chapel which can accommodate at least 150 seated mourners plus standing areas and overspill areas for large funerals, clear pedestrian flows and separation between services, retention of the North Chapel for small ceremonies, improved vehicular and pedestrian circulation, and new car park to accommodate 120 cars (including 20 spaces adjacent to the building for disabled parking), with scope for future expansion in the medium to long term.

The proposals are all considered to be sensitive to the Grade II Listed Building setting. Option D is likely to require the greatest level of consultation with the Heritage Officer in relation to a detailed Listed Building Consent application.

Options B, C and D will give rise to a level of disruption during the construction work, requiring phased and out of hours working by the contractor in order to allow the crematorium service to continue, but in these options there will be unavoidable periods, some protracted, where the facility is out of use.

Option E minimises disruption and provides the most flexible and long-term facility.

We recommend the project progresses based on:

1. **Option E** new build on the land to the east of the cemetery. This is the **recommended option**, subject to any shortfall in annual funding being acceptable and able to be mitigated, as this solution provides the most comprehensive long-term facility while also minimising disruption to the crematorium operations.

2a. Should option E not be supported on financial grounds then **Option D** for extension and alteration is recommended as a second preference. This will provide a good level of functionality and preserve the existing historic building, albeit without the long-term flexibility offered by E due to lack of future expansion space within the historic garden context. There will however be substantial disruption to the crematorium operations and a significant closure period.

2b. Should option D not be supported on financial grounds then **Option C** for remote crematory is recommended as an alternative second preference. This will provide a functional solution but with increased staffing requirements due to the split between chapels and crematory, and the need for coffins to be transferred by vehicle between chapels and crematory. Option C can however be provided in a way which would allow its future phased extension to provide a new chapel (effectively a phasing of option E) and space for other future facilities.

3. Should option D or option C not be supported on financial grounds then **Option B** is the fall-back position, achieving new cremators with abatement, improved traffic circulation and parking, and improved floral tribute area, but with no improvements to waiting areas or chapel capacity.

3.0 Objectives

The study was to identify strategic options for the crematorium to improve on its current financial and environmental performance, optimising the potential of the site without unduly compromising its special historic and natural environment. All options were to be technically feasible, economically viable and sustainable whilst offering value for money in terms of the investment required.

The appraisal was to address the following:

- Confirm and refine objectives and constraints;
- Identify and describe options;
- Identify and quantify the monetary costs (including cost/value of sites) and the assessed merits of the options;
- Identify non-monetary costs and benefits;
- Cost comparisons with similar facilities elsewhere;
- Assess each option's sustainability;
- Identify and analyse risks associated with each option and adjust for optimism bias;
- Evaluate the options against the agreed criteria and present clear results and conclusions;
- Advise the best approach to the financing, project management and procurement of recommended work following the feasibility study.

The appraisal was to conclude with the evaluation of all options against the following criteria:

- Cost
- Quality including the technical design considerations below
- Time
- Risk

and the identification of a recommended option or options.

The weightings given to the above criteria were to be agreed with the Director of Environmental & Regulatory Services.

Technical design considerations included:

- Identification and appraisal of possible sites for crematorium (within the scope set out below);
- Identification of any technical constraints and/or operational issues;
- Planning considerations, including any implications resulting from listed buildings, the registered park and garden, the significant numbers of trees which are worthy of protection and the nearby Area of Outstanding Natural Beauty;
- Environmental considerations: must include new equipment which is capable of delivering mercury abatement meeting current and anticipated legislative

requirements; should consider energy efficiency and the potential for heat recovery and renewable energy (recognising the planning constraints of the site)

4.0 Consultations

Consultation meetings have been held throughout the feasibility study with Cheltenham Borough Council staff and with the Funeral Directors who use the existing facility.

- 16th March 2015: Introductory/briefing meetings at the crematorium site.
- 16th April 2015: Consultation meeting on site with funeral directors.
- 16th April 2015: Cabinet member working group meeting and immediate project board meeting.
- 12th May 2015: Immediate project team meeting.
- 20th May 2015: Series of consultation meetings with the council officers including discussion following site visit by the Planning officer and Conservation officer.
- 5th June 2015: Immediate project team review meeting.
- 17th June: General review meetings and Cabinet member working group meeting.
- 13th August: Public Consultation Meeting on site (drop in meeting).
- 14th August: Consultation meeting on site with funeral directors, ministers, celebrants, organists and other interested parties.

The consultation process provided detailed insight into the workings of the existing facility, the existing constraints, the Planning and conservation context, the aspirations for an improved service, and public sentiment.

Records of the consultation meetings are in Appendix 1.

5.0 Initial Options Appraisal

Site visits and discussions were held with a wide range of parties in order to achieve a good understanding of the present constraints and opportunities.

The existing cremator plant is unsatisfactory and is demanding ongoing reactive maintenance, placing an operational and financial burden on the Council. The lack of abatement means the Council are required to contribute financially to the Cameo scheme, and the costs of this are not presently being recovered.

The design of the cremators has created an unsatisfactory working environment with regular access needed for repairs in high ambient temperatures. Safe working practices have had to be been established by the crematory staff to reflect these unusual conditions and to enable the service to continue. Replacement of the plant with high quality abated cremators is a priority.

The present road network is generally two way, with the narrowness of the roads resulting in bottlenecks which impede traffic flows. There is limited scope for road widening due to the proximity of existing graves.

The parking capacity is very limited, with cars as a consequence being abandoned along the narrow roads and also on burial plots, exacerbating the general traffic circulation problems. The restricted parking capacity also results in people arriving early for services in order to try to find a parking space, further increasing the number of cars trying to park on site.

The existing building has a single waiting room which is shared by both existing chapels. The waiting room does not have sufficient capacity to accommodate the number of mourners, particularly given that people arrive early to try to find a parking space. This has required elevated levels of management by crematorium staff. The single chapel arrangement also can cause confusion when people are called for a particular service.

The existing floral tribute area is remote from the crematorium building, resulting in it being little used and seldom visited.

In relation to the existing building, basic problems were identified with the current layout, for example:-

- North Chapel views to lectern are blocked when the catafalque curtain closes.
- There is overlooking of family members by the South Chapel side pews, reducing privacy for the family on what is a stressful and emotional event.
- There is no covered area when leaving the chapels, exposing people to adverse weather and resulting in people being unable to congregate after a service.
- North Chapel has no link to the crematory, requiring coffins to be temporarily stored prior to be taken through to the crematory between services.
- Bearers share the waiting area as they have no dedicated space.

The initial options appraisal identified 8 potential strategies, together with variations thereof totalling 18 potential approaches. These explored the potential for:-

- reuse of the existing building
- extension of the existing building
- new build within the existing crematorium grounds (including the area identified as the nursery)
- new build on adjacent ground outwith the crematorium site
- remote crematory options
- opportunities for improvement of the vehicular circulation, pedestrian circulation, car parking provision, floral tribute enhancements, and, where possible, other related improvements and potential for medium and long term expansion in the future.

The drawings in Appendix 2 show the various options. The analysis of these is in Section 9.0 Options Review.

Constraints of the Cremation Act 1902:

The options appraisal drawings identified in particular which of the potential sites were immediately non-viable under The Cremation Act 1902 (Section 5) which provides that no crematorium shall be constructed nearer to any dwelling house than 182.88 metres, except with the consent in writing of the owner, lessee and occupier or any such house.

The 182.88 metre radii are indicated on the drawings.

6.0 Topographical, Arboricultural and Ecological Studies

A need was identified for topographical, arboricultural and ecological studies to support the feasibility study and these were commissioned by Cheltenham Borough Council.

Topographical survey drawings reference SUR.1126 were issued on 18th May 2015, providing good information on the existing topography, identifying tree locations and providing an accurate base for the development of the strategic proposals.

The arboricultural report by Tree King Consulting was issued on 8th May 2015. This enabled the identification of any significant trees which may be affected by the proposals. Where possible the removal of trees has been avoided, but certain trees are proposed for removal (identified on the developed drawings), with new replacement tree planting proposed in mitigation, and this approach is considered acceptable by the council Tree Officer. Protection of specific trees will be discussed further as part of the Planning Pre-application Process.

Lepus Consulting provided an Extended Phase 1 Habitat Survey in April 2015, which made recommendations for further surveys in relation to reptiles, amphibians and badgers, and a recommendation that a bat survey is undertaken in relation to any works proposed at the existing building.

Lepus Consulting were further commissioned to carry out a great crested newt survey and their report was provided in June 2015 advising that no great crested newts had been found in relation to the land which may be affected by the proposed crematorium work. Lepus have concluded that no mitigation measures are necessary in relation to reptiles or amphibians.

Lepus were instructed to carry out monitoring of an identified badger sett and have made recommendations. The protective measures which are identified will be straightforward given the location of the set on the site.

A bat survey will be required at an appropriate stage in advance of a Planning Application being lodged in relation to work to the existing building. If bats are identified then an appropriate licence will need to be obtained prior to work commencing on site.

Summary:

Presently there are no unusual or onerous ecological mitigation measures anticipated.

7.0 Sustainability

Sustainability has been reviewed in relation to the following key aspects:-

- Energy use
- Water use
- Historical preservation
- Future growth

The proposed replacement cremators are anticipated as reducing gas use, as the available cremator products are expected to be more efficient than the existing cremators. Gas usage figures have been included in the cost calculations based on appropriate figures from one potential manufacturer.

There is no anticipated increase in water use. In relation to the detailed M&E design, it is anticipated that any new equipment will use low-flow fittings and the potential for rainwater harvesting can also be explored if appropriate within the selected solution.

The design proposals aim at preservation of the existing Grade II listed building and the Registered Park and Garden. In relation to the existing building the primary aim has been to preserve the 1864 elements of high significance and retain and adapt the 1938 areas of medium significance, with the 1960s extension removed where necessary given its low significance.

Accommodating the current and anticipated congregation sizes has been a key element of the study. The existing chapels have the following capacity:-

North Chapel: 59 seated comfortably, plus approximately 20 standing.
South Chapel: 78 seated comfortably, plus approximately 50 standing with the door closed, and another 25 standing with the inner door open.

The feasibility study targets providing a chapel with a seated capacity of 150 and significant standing and overspill space for large funerals. This is considered to be a key element of the facility being fit for use for the foreseeable future.

The medium and long term viability have been considered. Feedback from the Funeral Directors indicates that they believe the existing building to be no longer fit for purpose. A significant extension of the building or a new build solution are considered by the Funeral Directors to be necessary in order to sustain the crematorium as a suitably attractive facility. This view has been borne out by the subsequent wider public consultation.

In relation to the new-build option a 60 year basic building life is envisaged, with consideration given to scope for adaptation and future expansion to meet the needs of a growing population and potential changes in technology.

8.0 Conservation

The proposals aim to “tread lightly” on the site, preserving the existing Grade II listed building elements of High and Medium Significance (as identified in the Statement of Significance dated January 2015), the existing cemetery graves and monuments, and respecting the gardens of Special Historic Interest.

New Access Road

Where the new access road is proposed the route has been selected to avoid existing gravestones and preserve where possible existing trees, while achieving a practical and viable route to provide one-way traffic flows, thereby removing bottlenecks.

The new road together with the provision of the new car parking area on open ground within the cemetery should alleviate the problem of cars parking on existing graves.

Given the sensitivity of the site a more detailed topographical survey was undertaken in the area which may be affected by the new road. This survey recorded existing levels, locations of graves and memorials, and locations of trees, shrub beds, hedges and lawns. This has allowed a more detailed study of the potential route for the road, indicating that this remains a feasible proposition.

See drawing 6333-SK01 in Appendix 4.

An alternative to the new access road would be to bring the exit route through the existing memorial gardens road network. The roads in this area are however narrow and lined with memorials. This alternative route is therefore not the preferred option, but can be explored further at the detailed design stage.

See drawing 6333-SK02 in Appendix 4.

Floral Tribute Area

The proposed floral tribute area which is identified on solutions involving the existing building (Options B, C and D) proposes the pedestrianisation of a secondary leg of road and the insertion of a new covered structure. The detailed design of the floral tribute structure will sensitively preserve the existing graves and memorial stonework.

Given the sensitivity of the site a more detailed topographical survey was undertaken in the area which may be affected by the new floral tribute area. This survey recorded existing levels, locations of graves and memorials, and locations of trees, shrub beds, hedges and lawns. This has allowed a more detailed study of the impact of the floral tribute area, indicating that this remains a feasible proposition.

See drawing 6333-SK03 in Appendix 4.

9.0 Options Review

Eight main strategies and associated sub strategies (totalling 18 potential options) were developed for consideration.

A number of these were discounted in consultation discussions and reviews. A detailed summary of the reasoning for this is in the Options Matrix in Appendix 2.

The main points are summarised below:

Option 1: Do nothing: Discounted as the existing cremators are not fit for purpose.

Option B (Option 2): Replace cremators within existing plantroom: Potential Solution.

Option C (Option 3): Remote crematorium: Initially discounted as a remote crematory would require the transfer of coffins between the chapels and the crematory. This option was subsequently reintroduced and a capital cost estimate prepared, but is potentially less desirable than other options given the sensitivities of coffin transfer and the need for additional staff to operate between two locations.

Option 4: New cremator plantroom extension to the rear of north chapel: discounted as this would place the plantroom within 182.88m exclusion zone from existing housing.

Option 5: Relocate cremators within existing north chapel: discounted as this would place the plantroom within 182.88m exclusion zone from existing housing.

Option D (Option 6): Replace cremators within existing plantroom area and extend to provide new facilities: Potential Solution, subject to legal advice on proximity to houses.

Option 7: Construct new crematorium within site curtilage: discounted as this would place the plantroom within 182.88m exclusion zone from existing housing.

Option 8: New build crematorium outwith site area.

Options 8a, 8e, 8f, 8g and 8h were discounted as these would place the plantroom within 182.88m exclusion zone from existing housing.

Options 8b & 8c were subsequently discounted as these would lie within a 182.88m radius of land identified as being for potential housing development in the proposed Local Plan. To avoid prejudicing future housing development it was agreed that the crematorium should avoid such encroachment.

Option E (Option 8d): New build option outwith site curtilage on land to east: Potential Solution.

Outcome of Options Review

The following options remained following the options review:-

Option B: Replace existing cremator plant within existing crematory.

Option D: Replace existing cremator plant within existing crematorium, demolish existing single storey extension and construct new extension to improve facilities.

Option E: New build crematorium on land adjoining the site boundary to the east.

The drawings for each initial option can be seen in Appendix 2.

10.0 Developed Options Appraisal

Designs for options B, D and E were developed further to enable the cost estimates and business case to be developed. Option C (remote crematory) was also reintroduced following discussion, and included in the cost estimates and business case.

All of the developed options provide a new link road to achieve one way traffic, 120 new car parking spaces, improved pedestrian links from car parking area to the crematorium, and improved floral tribute area.

Commentary:

Option A: Do nothing option

- Discounted as replacement of the existing plant is essential.

Option B: This is the minimum option:

- Cremators replaced and abatement installed
- Disruption of the service during the work, managed by out of hours working
- No improvement to public areas
- No improvement to chapel capacities
- Traffic flows improved
- Parking improved
- Floral Tribute improved

Option C: Remote crematory:

- Cremators and abatement installed in new build crematory
- This option is considered by the crematorium management to be operationally less desirable given the need to split staff between two locations.
- Option 3 can however be provided in a way which would allow its future phased extension to provide a new chapel (effectively a phasing of option 8d) and space for other future facilities.
- No disruption of the services during the work
- Straightforward switch-over of the cremation function from existing to new
- No improvement to public areas
- No improvement to chapel capacities (but scope for expansion of South Chapel into vacated crematory area)
- Traffic flows improved
- Parking improved
- Floral Tribute improved

Option D: Alteration and extension of existing crematorium:

- Cremators replaced and abatement installed
- Disruption of the service during the work for a prolonged period, managed by out of hours working

- Public areas improved
- Chapel capacities improved (North Chapel 133 seated plus standing and overspill provision)
- Traffic flows improved
- Parking improved
- Floral Tribute improved

Option E: New build crematorium:

- Cremators and abatement installed in new build crematory
- No disruption of the services during the work
- Straightforward switch-over of the cremation function from existing to new
- New public areas
- Increased chapel capacities (>150 seated plus standing and overspill provision)
- Traffic flows improved
- Parking improved
- Floral Tribute improved

The drawings for each developed option can be seen in Appendix 3.

An Evaluation Matrix assessing each option in relation to agreed evaluation criteria was developed in conjunction with the Council to enable scoring of these options. The scores can be seen in Appendix 5 and established the order of preference as Option E, then Options C & D, then Option B.

The Council developed the Evaluation Matrix further, and the Council's own evaluation scoring reinforced these results.

11.0 Cost Estimates

The cost estimates prepared by our Quantity Surveyor have been incorporated into the financial spreadsheets prepared by Cheltenham Borough Council

The cost estimates compared the anticipated capital expenditure for options B, C, D and E, including construction works, contractor's preliminaries, contractor's overheads and profit, design and construction contingency and professional fees.

The costs have been projected to the third quarter of 2016 to allow for design development, statutory consents, tendering and construction lead-in.

The cost report includes a benchmarking study comparing the costs with other similar facilities and confirming that the anticipated construction costs are in the range which would be expected for a project of this nature.

All of the costs have been based on providing two new FT3 (bariatric size) cremators with abatement. Options C, D and E have allowed floor space for a third future cremator.

The introductory part of the cost estimate lists assumptions and exclusions.

Total Estimated Construction Cost Summary:

Option B: £2,483,000

Option C: £5,119,000

Option D: £5,446,000

Option E: £6,565,000

12.0 Business Case

The predicted financial effect of each option has been analysed by Cheltenham Borough Council.

13.0 Recommendation

We recommend the project progresses in the following order of preference:

1. **Option E** new build on the land to the east of the cemetery. This is the **recommended option**, subject to any shortfall in annual funding being acceptable and able to be mitigated, as this solution provides the most comprehensive long-term facility while also minimising disruption to the crematorium operations.

2a. Should option E not be supported on financial grounds then **Option D** for extension and alteration is recommended as a second preference. This will provide a good level of functionality and preserve the existing historic building, albeit without the long-term flexibility offered by E due to lack of future expansion space within the historic garden context. There will however be substantial disruption to the crematorium operations and a significant closure period.

2b. Should option E not be supported on financial grounds then **Option C** for remote crematory is recommended as an alternative second preference. This will provide a functional solution but with increased staffing requirements due to the split between chapels and crematory, and the need for coffins to be transferred by vehicle between chapels and crematory. Option C can however be provided in a way which would allow its future phased extension to provide a new chapel (effectively a phasing of option E) and space for other future facilities.

3. Should option D or option C not be supported on financial grounds then **Option B** is the fall-back position, achieving new cremators with abatement, improved traffic circulation and parking, and improved floral tribute area, but with no improvements to waiting areas or chapel capacity.

14.0 Next steps:

- Approval to proceed with the recommended Option.
- Scoping of design team services.
- Procurement and appointment of design team.
- Development of detailed design for Planning Application and Listed Building Consent application.
- Development of brief and tender documentation for cremator equipment procurement.
- Review of preferred tender process for construction work (traditional or design & build) to reflect selected option.
- Development of tender documentation for the construction work.

15.0 Procurement

Once the preferred option has been selected, procurement of the subsequent stages in the project can be progressed. This will need to encompass design team procurement, cremator equipment procurement and main contractor procurement for construction.

Design Team Procurement:

We envisage that the design team will include:

- Architect
- Principal Designer (as defined in the CDM Regulations 2015)
- Quantity Surveyor
- Structural Engineer
- Mechanical & Electrical Engineer
- Clerk of Works (for construction phase)

The Architect will be responsible for directing the design team and reporting to the Client's representative.

We do not envisage any need for a separate Project Manager appointment in relation to the construction work. We strongly recommend however that there is a Project Manager for the overall project, to be the Client's representative as a single point of contact, and ideally be fully conversant with the Council processes and procedures.

Appointment of the design team members will need to comply with the procurement rules. This can involve two paths, either

1. OJEU-compliant new procurement process, or

2. The selection of consultants from an established OJEU-compliant framework.

We anticipate the Council will have standing orders in this respect which set out the procedures to be followed.

The indicative pre-contract programme has assumed Path 2.

Path 2 has advantages in significantly reducing the time required for design team selection and appointment, with consultants being able to be appointed immediately.

Path 1 would require an extended period which we anticipate would add three months to the programme.

We therefore recommend Path 2 if an appropriate existing framework can be accessed. Path 2 may also mitigate risk as a suitable framework is likely to already have included a quality evaluation prior to consultants being appointed to the framework.

Cremator Procurement:

Appointment of a cremator specialist for the design, manufacture, installation and maintenance of the cremator equipment will need to comply with the procurement rules.

This is likely to involve advertisment of the contract and we anticipate the Council will have standing orders in this respect which set out the procedures to be followed.

It will be essential for a suitably comprehensive performance specification and tender document to be prepared to enable a robust quality and price tendering exercise to be undertaken.

This should establish track record of similar installations, references from a number of existing operators on the performance of the installations (quality, maintenance, costs, problems and support), references for quality of site management during installation, outline proposals for layout and spatial requirements, tender price for removal and disposal of existing plant, tender price for installation of new plant and commissioning and testing thereof (including emissions testing), and tender price for post-installation maintenance and support for a set period (eg: 15 years) which we recommend should be on an “all in” comprehensive basis to allow smoothing of the annual expenditure on maintenance.

We recommend that procurement of the cremator equipment should be separate from the Main Contract for the construction work, but the Main Contractor would have an obligation to coordinate the timing of the cremator equipment installation.

Construction Procurement:

Appointment of a Main Contractor for the construction work will need to comply with the procurement rules. This can involve two paths, either

1. OJEU-compliant new procurement process, or

2. The selection of a suitably experience building contractor from an established OJEU-compliant framework.

We anticipate the Council will have standing orders in this respect which set out the procedures to be followed.

The indicative pre-contract programme has assumed Path 1.

Path 2 has advantages in potentially reducing the time required for contractor selection, and potentially permitting a two stage quality and cost tendering process. This process may not however reduce the overall programme, as it is likely that second stage tenders cannot be sought until such time as the design work has been advanced to a level of detail suitable to enable accurate pricing by contractors. There is further commentary on this below as the procurement method can affect the time required for tendering.

Paths 1 and 2 are equally appropriate, but there may be advantages in Path 2 in simplifying the procurement process. Path 2 may also mitigate risk as a suitable framework is likely to already have included a quality evaluation prior to contractors being appointed to the framework.

Procurement Methods

The two most appropriate potential procurement methods are:

1. Traditional
2. Design & Build (D&B).

A third method is Management Contracting, which we do not recommend.

The merits of these optional methods are compared below:

1. Traditional Procurement:

Traditional procurement emphasises quality and cost certainty at the expense of time.

This means that the quality of the competed project is likely to be higher under traditional procurement than for D&B, and the tendering contractors have more information at tender stage in order to price as accurately and competitively as possible due to their financial risk being minimised. This is at the expense of time as the design and specifications need to be developed to a suitably comprehensive level prior to tenders to be invited.

With traditional procurement the design team remain client side.

Pros:

Control of quality through detailed design and specification
Control of cost
Accurate tendering (full design information at tender stage)
Design team remain client side
Suitable for new-build and work to sensitive existing buildings

Cons:

Lead in times for production of full design information

2. Design & Build (D&B) Procurement:

D&B procurement emphasises cost certainty and time at the expense of quality.

This means that the work can usually start on site earlier than with traditional procurement, as the contractor is responsible for completing the design. The tendering contractors often have a restricted level of information at tender stage. Their pricing therefore allows an element for risk, which while giving the client cost certainty can as a

consequence increase the tender price compared to traditional procurement. Quality of the competed project is likely to be lower under D&B procurement than for a project procured under traditional procurement, as the contractor is responsible for completing the design based on an Employer's Requirements document, allowing latitude in interpretation of how such requirements are achieved.

With D&B procurement the majority of the design team are novated to the successful contractor (ie: in the initial stages the team are employed by the client, but after novation the team are employed by the contractor, and their responsibility correspondingly moves to the contractor). The quantity surveyor becomes Client's Agent.

Pros:

Control of cost (through cost risk transfer)
Potential for earlier site start than with Traditional procurement
Suitable for new-build

Cons:

Design development by contractor post-tender can diminish quality
Design team no longer directly linked to client
Not suitable for work to sensitive existing buildings

3. Management Contracting Procurement:

Management Contracting procurement emphasises time and quality at the expense of cost certainty.

This method is used when the brief has not yet been fully defined but there is an imperative to deliver a project to an accelerated timescale. The risks associated with costs not being fully defined at the outset are high, and the outcomes of cost escalation have been well publicised in relation to high-profile projects.

We do **not** consider Management Contracting appropriate for this project.

Pros:

Quality of construction
Control of detailed design
Earlier site start than with Traditional or D&B procurement
Suitable for new-build and work to sensitive existing buildings

Cons:

Significant cost risk lies with Client
(this procurement route should in almost all instances be avoided)

Suitable Procurement Routes:

In relation to the four options presently identified (excluding Option A), we suggest that the following procurement methods would be appropriate:

Option B:
Traditional (work to Grade II Listed Building requires high quality and care)

Option C:
Potentially separate contracts, being Traditional for the work to the existing Listed building and D&B for the new build element to suit programme imperatives.

Option D:
Traditional (work to Grade II Listed Building requires high quality and care)

Option E:
Traditional or D&B to suit programme imperatives

16.0 Indicative Programme

An indicative programme is overleaf showing appropriate periods for the various options. This includes for design development, applying for and obtaining statutory consents, tender, lead in and construction periods, soft landings handover procedure at completion, and also indicates post-completion rectification periods and post-occupancy monitoring and evaluation.

The programme has assumed design team appointment via an existing OJEU-compliant framework.

If design team procurement is instead via a new OJEU process then this will add circa 3 months to the programme.

The programme has assumed Main Contractor appointment via an OJEU-compliant process.

If Main Contractor appointment procurement is instead via an existing OJEU-compliant framework then this will simplify the procurement process but will not shorten the overall programme, as the procurement period will still overlap with the design development periods.

The programme has assumed Traditional Procurement.

If Design & Build procurement is followed we do not anticipate the programme varying, as D&B contractors are presently seeking extensive up-front information when tendering in order to minimise their cost risk.

17.0 Appendix 1: Consultations & Meeting Records

18.0 Appendix 2: Initial Options Appraisal Drawings & Options Matrix

19.0 Appendix 3: Developed Options Appraisal Drawings

20.0 Appendix 4: Access Road and Floral Tribute Area Drawings

21.0 Appendix 5: Evaluation Matrix

22.0 Appendix 6: Programme Chart