School Building Project

Project Execution Plan

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Version Control

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| 1.0 | Draft for Client Review and Comment | May 2020 |
|  |  |  |

**Controlled Documentation**

This document has been compiled by KBR and remains the property of KBR as the registered holder.

The registered holder is responsible for its safe custody, for inserting all revisions and for removing all pages made obsolete by revisions. It is the responsibility of the registered holder to distribute any revisions of the Project Execution Plan (PEP). The registered holder only will make and issue any revisions to the document.

The register holder will review these procedures manually and periodically, to reaffirm its adequacy and conformity to the current requirements of Leatherhead School Trust. Revisions shall be made by replacement of the applicable section or sections.

**Use and Content**

The PEP is the governing document that establishes the means to execute, monitor, and control projects. The plan serves as the main communication vehicle to ensure that everyone is aware and knowledgeable of project objectives and how they will be accomplished. This document is not legally binding. The KBR representatives will always maintain excellent communications with Leatherhead School Trust and wider delivery team.

Whilst certain procedures are detailed in this document, the provision of such details should not be construed as limiting the obligations of the parties.

These procedures are subject to review and may be amended by agreement. Any amendments will be issued to all parties for inclusion in their procedures.

**Amendment Procedure**

Representatives of KBR and Leatherhead School Trust may propose amendments to the Project Execution Plan. Proposals should be submitted in writing to the Lead Project Manager, stating the following:

* Background to the proposed amendment
* Section(s) of the Project Execution Plan which would be affected
* Benefit(s) obtained from adopting the proposal and
* An outline of the proposed change in sufficient detail for its merits to be properly considered

Proposed amendments will be considered in conjunction with the Project Director. Where a proposal is approved, the registered holder will amend all relevant sections and reissue.

# Scope of the Project Execution Plan

The PEP is an approved document that defines the procedures for successful delivery of a secondary school and sixth form college expansion located in High School Leatherhead. By using a comprehensive methodology, that defines how the project will be executed, monitored, and controlled, the aim is to ensure successful delivery of the project scope in line with the programme objectives set by the Leatherhead School Trust.

## Project Background

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## Site Location

## Scope of Works

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## Milestones

The milestones have been identified within the project programme and these have been aligned to the demands of the project requirements and the Leatherhead School Trust approval gateways, (refer to Appendix B).

|  |  |
| --- | --- |
| **Activities** | **Milestones dates** |
| Stage 0 - Strategic Definition Complete | 27/04/2023 |
| Stage 1 - Preparation and Briefing Complete |  |
| Stage 2 - Concept Design Complete | 27/07/2023 |
| Stage 3 - Spatial Coordination Complete |  |
| Stage 4 - Technical Design Complete | 27/10/2023 |
| Stage 5 - Manufacturing and Construction Complete |  |
| Stage 6 - Handover Complete | 01/01/2025 |

## Project Constraints

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## Project Objectives & Outcomes

## Success Criteria

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# Project Governance

The governance structure determines how the client decides upon its requirements, approves funding and control progress of the project. A robust governance structure is essential to ensure that delegated authority and accountability are unambiguous.

Governance of Leatherhead School Trust is demonstrated within the Code of Corporate Governance. The approvals and general project governance of the project is via Alex Madani-Roberts of Leatherhead School Trust who reports back and acts as a representative of other key stakeholders at Leatherhead School Trust.

The KBR gateways are part of this governance process and are prescribed within KBR Governance Policies.

## Project Team

The project involves several stakeholders and various parties. The main purpose of identifying those parties is to ensure that there are no duplications or gaps. All parties should endeavour to ensure the continuity of personnel for the duration of the project. The Project Directory is included in Appendix C.

## Roles & Responsibilities Matrix

The following table illustrates the roles and responsibilities of the key stakeholders involved in delivery of this project:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Task / Activity / Role | Leatherhead School Trust | Leatherhead High School | KBR | Leatherhead Building Co | Surrey Architects |
| Employer / Client | Y |  | Y |  |  |
| Site Arrangements | Y | Y |  |  |  |
| Project Management | Y |  | Y |  |  |
| Cost Management | Y |  | Y |  |  |
| Design Specification | Y | Y |  |  | Y |
| Principal Designer |  |  |  |  | Y |
| Client Health & Safety Advisor | Y |  | Y |  |  |
| Procurement | Y | Y | Y |  |  |
| Contract Documents | Y |  | Y | Y |  |
| Construction |  |  | Y | Y | Y |
| Management & Implementation | Y |  | Y |  |  |
| Change Control | Y |  | Y | Y |  |
| Contract Administration | Y |  | Y |  |  |
| Building Control Interface | Y | Y | Y |  |  |
| Operation & Maintenance Manuals | Y | Y | Y |  | Y |
| Facilities Management |  | Y |  | Y |  |

# Communication

The delivery of this project of will require regular communication between Leatherhead School Trust, Leatherhead Building Co - the Principal Contractor, KBR, and other supply chain delivery partners as appropriate to ensure that we are working collaboratively to realise the programme objectives and outcomes.

It is neither possible nor desirable to identify all the communication that may take place. At the same time managing communication is important because the programme has public visibility. This mean that all messages and communication approaches need to be carefully agreed so that sensitivities are catered for.

The communication strategy is as follows:

## E-mail

Wherever possible, E-mail should be used for communicating information. General project correspondence can be included within the email, however contractual or commercially sensitive issues are to be communicated under cover of a letter with the E-mail acting only as a mode of transport to deliver the correspondence. Electronic signatures must accompany the e-mailed correspondence.

## Verbal Communications

Project critical verbal communications, whether in person or by telephone shall be recorded in writing and any salient matters, decisions etc. communicated to the project team members in accordance with above. ‘Project Critical’ to mean communications which have Time, Cost and Quality implications.

All telephone/ verbal communication that can be considered as potential contractual significance to be recorded on a file note and filed (i.e. site diary).

All drawings, reports and other correspondence, except letters, shall be distributed via project via contractor’s collaboration software.

## Schedule of Meetings

The table illustrates the schedule of meetings required to take place during the pre- and post-contract stages.

|  |  |
| --- | --- |
| Meeting Type | Frequency |
| Design | Monthly |
| Risk Workshop | Quarterly |

## Project Reporting

A monthly project report will be produced by the KBR Lead Project Manager. Subject to agreement with Leatherhead School Trust the reports will include the following:

|  |  |
| --- | --- |
| Report Type | Frequency |
| Executive Summary | Bi-Monthly |
| Progress against completed milestones | Weekly |

These monthly reports will be based on the Contractor’s progress reports, including, risks, programme and decision required logs provided by the Contractor 7 days prior to KBR monthly reporting.

## Cost Reporting

Commercial reports will be required on a regular basis prepared by KBR Commercial Management Team.

## Client Assurance Reporting

KBR will work with conjunction with Leatherhead School Trust to support activity where appropriate and within the scope of the KBR appointment for Leatherhead High School expansion.

# Information Management

## Document and Record Management

All project documentation, including contract documentation, drawings, specifications, meeting minutes, test data, blank forms, workshop outputs, directories, programmes etc. Levels of access will be agreed with Leatherhead School Trust to allow either full access or restricted access to specific areas.

## Correspondence

All contractual information shall be in writing and shall be addressed to for the attention of the identified “Primary Contact Person” within each organisation as identified in the Project Directory and clearly indicate the distribution that has taken place. Sub-titles identifying the correspondence subject should be used ad appropriate.

It is to be agreed that Leatherhead School Trust have setup a SharePoint access for the Project Team to share agreed project information.

A folder structurecan be established on the SharePoint named “KBR Only”.

KBR project managers will upload information in PDF format unless otherwise specified or agreed. Documents will be uploaded at regular intervals to allow stakeholders to review information.

## Project Directory

A Project Directory is produced and will be updated as necessary. The document to be stored at KBR X drive and include details of companies and team members involved on the project. Refer to Appendix C.

## Information Management:

* **Drawing Format** Leatherhead Building Co to confirm
* Checking

All drawings for contract or construction purposes are to be checked by a senior person of the appropriate discipline and shall be signed as checked and marked with the relevant approval.

* **Issue of Drawings –** Surrey Architects to confirm Leatherhead Building Co
* **Drawing Register**

Each discipline must maintain its own drawing register containing the following details of all drawings produced:

* Drawing Number
* Drawing Title
* Scale
* Size
* Status of Issue
* Current Revision
* Date of Issue
* Distribution

# Project Management

The Association of Project Management (APM) define project management as “the application of processes, methods, knowledge, skills and experience to achieve the project objectives”.

A project is a unique, transient endeavour, undertaken to achieve planned objectives, which could be defined in terms of outputs, outcomes, or benefits. A project is usually deemed to be a success if it achieves the objectives according to their acceptance criteria, within an agreed timescale and budget.

Responsibility for these components lie with a project sponsor and a project manager. The project sponsor is accountable for achievement of the business case and providing senior-level commitment to the project.

The project manager is responsible for day-to-day management of the project and must be competent in managing the six aspects of a project, i.e., scope, schedule, finance, risk, quality, and resources. Well-developed interpersonal skills such as leadership, communication and conflict management are also vitally important.

KBR will allocate resource to projects that fulfil this requirement and those who are familiar with this project delivery model with the key elements: scope, time, finance, risk, quality, and resource.

Project management will be undertaken in accordance with this project execution plan and any agreed project management plan.

## Stakeholder Engagement

Stakeholder management is a critical activity in setting up and implementing a project. The Leatherhead School Trust project has multiple stakeholders and managing their input into the project is vital if it is to be successful. This involves identification and analysis to understand their needs and influence, and the level of communication required.

The objectives of stakeholder management are to:

* Identify stakeholders and understanding their needs and influence on project decisions.
* Ensure that key decisions and changes are communicated in a timely and effective manner.
* Obtain feedback on stakeholder concerns and taking action to address them.

Leatherhead School Trust will support KBR in identifying and managing stakeholders. Given the organisational structure within Leatherhead School Trust together with external bodies and other council departments there are numerous stakeholders all of whom have an important part to play in project delivery. Consequently, Leatherhead School Trust and KBR should collaborate to:

* Identify stakeholders
* Map stakeholder interests and influences to establish an appropriate management and communication strategy
* Develop a stakeholder engagement strategy that describes what will be communicated, how, to whom and when.
* Implement the stakeholder engagement strategy
* Review and update the stakeholder engagement strategy as the project develops

## Requests for Information

The KBR Project Management Team will administer a request for information procedure by acting as the intermediary between KBR and the Leatherhead School Trust team. All requests for information will be channelled through a KBR representative who will implement the process and act as the intermediary to collect and exchange information.

Each request will then be logged on the KBR Tracker Schedule which will be stored on Leatherhead School Trust SharePoint and used as a live document.

Regular meetings will be established between stakeholders to review the RFI tracker.

Leatherhead School Trust and stakeholders will adopt the following process for RFIs:

* Issue initial RFI to KBR Project Team via email.
* RFI should include following details:
  + Name / subject heading
  + Explanation and details of info request
  + Name / stakeholder to respond
  + Date requiring response

Designers are required to keep their own record or schedule of information requests and should not rely on the KBR process.

## Change Control

The KBR Project Management Team will administer a pre-contract change control process.

Once a change has been requested, the KBR Project Team will complete a change control form. The form will be completed by a KBR representative with the assistance from all required stakeholders and presented at the change control board for discussion. KBR will track any changes on a document tracker. The tracker will be kept on Leatherhead School Trust SharePoint and used as a live document.

Post contract change control will be covered as a variation in accordance with contract.

## Decision Log

The KBR Project Management Team will maintain decision logs as part of their project management toolkit which will record the following:

* Date the decision was made
* Details of the decision
* Who made the decision?
* Status of the decision
* Resulting actions

## Project Delivery Team Meeting Protocol

Project delivery team meetings will be organised and chaired by the KBR Project Manager who will undertake the following:

* Prepare meeting agendas and discussion points.
* Take meeting notes and log action points (to be circulated after each meeting).
* Document key decisions.
* Develop the site-specific Risk Register (with the project delivery team members).
* Follow up on open actions.
* Arrange the date and time for the next meeting.
* Act as a central point of contact for the project delivery team.

# Programme Delivery

## Programme for Delivery

Included within Appendix B of the delivery programme. The programme provides a schedule of the main activities and milestones to the meet the objectives of the client and end users based upon the information available at the time of writing. A revision of the programme will be undertaken upon the receipt of further information and engagement is authorised by Leatherhead School Trust to engage with the appointed subconsultants in respect of the planning and construction phases.

The project team is required to adhere to this programme and commit resources as necessary to achieve the required dates. Any delay to the programme must be communicated to the project management lead with sufficient detail to justify any change in dates.

Any revisions to the master programmes will require to be formally agreed with the client.

## Progress Updates

The delivery programme will be reviewed on a weekly basis during the pre-contract period and reported against in the Project Delivery Team meetings.

# Cost Management

## Cost Management

Throughout the project delivery process, it is essential that both cost planning (pre-contract) and cost reporting (post contract) is clear, concise, and issued in a timely manner to inform decision making. Provide below indicative narrative of cost management activity to be undertaken by KBR and will take place during the project development process.

The process to be adopted will be based on KBR experience, using the same Cost Report template that has been used and refined in conjunction with Leatherhead School Trust. Circulation will be to the Leatherhead School Trust teams. When required, KBR will work closely with Leatherhead School Trust on the production of cash flows to aid forecasting.

## Detailed Design

At detailed design stage costs produced by the Principal Contractor will be reviewed and validated by the KBR Cost Management team, flagging any concerns which arise.

## Procurement

KBR will assist Leatherhead School Trust to review, analyse and interrogate costs presented by the Contractor. Commentary will be provided in the form of a tender report as to whether the costs presented appear reasonable and value for money or otherwise.

KBR will oversee the production of Contract Documents to ensure contract documents are sufficiently robust. KBR will work with Leatherhead School Trust legal representatives and the Main Contractor to close out any contractual matters that arise.

## Cost Reports

Throughout delivery, monthly (unless an alternative frequency is agreed) cost reports will be prepared and issued electronically (via email) to Leatherhead School Trust unless otherwise instructed. The Cost Management report will provide commentary on the following items:

* Monthly valuations
* Monthly financial reports
* Variations

The overall financial position will be reported against the project budget set by Treasury in the approved Business Case and any potential breach of the budget notified at the earliest opportunity.

## Contract Variations and Instructions

KBR will review any costs presented by the contractor associated with contract variations and instructions. Commentary will be provided to Leatherhead School Trust as to whether the costs presented appear reasonable and value for money or otherwise.

## Handover & Final Account

KBR will review the final account and validate it, ensuring costs are supported by the appropriate substantiation.

The project teams are to use the standards documents templates unless agreed otherwise. Where documents or any relevant records are managed through the SharePoint, these will be maintained within the defined structure established by KBR.

# Risk Management

All project team members are required to actively participate in the identification, assessment, and management risks.

The Project Management team will maintain the live programme risk register, formally updating it regularly and issued in addition to the Project Manager’s report. The register will be populated with input from the whole team to highlight the potential risks throughout the programme. Mitigation measures will be identified and logged with the associated risks.

## Risk Register

The risk register will be maintained by the project team for the Leatherhead High School project.

Initial risk workshops have been attended by stakeholders and the project level risk register has been prepared.

KBR to Chair the workshop and record risks into the Risk Register. The Risk Register is reviewed at subsequent review meetings / workshops as required which will be utilised as a key management tool. Refer to Appendix D for latest version of the Risk Register.

A live version of the Risk Register will be uploaded onto SharePoint in the KBR Project Folder. A key representative from all key stakeholders will be given editing rights to the folder to maintain control over the document. New users requiring editing rights will require approval by stakeholders which will be discussed and agreed.

# Change Control

## The change control procedure

The change control procedure to be administered in partnership between the Lead Project Manager and the Cost Manager with the final sig off from Leatherhead School Trust and the instruction by the Lead Project Manager. These are:

* Early warning notification
* Notice of compensation event
* Request for instruction
* Change request
* Outgoing instruction
* Confirmation of instruction, including verbal instruction

Prior to undertaking any change in design or scope, the Client will be advised on cost and time implications where practicable before works are carried out.

# Health & Safety

## Construction (Design and Management) Regulations (CDM)

Leatherhead School Trust have appointed Leatherhead Building Co to undertake the Principal Designer Role as required under the Construction (Design and Management) regulations 2015. Leatherhead Building Co will at their discretion appoint a Principal Designer Advisor to assist them undertaking these duties. - Development of the Construction Phase Plan in a manner that incorporates best industry safety practices.

Where there is more than one contractor working on a construction project at any time, the client must appoint in writing, as soon as is practicable:

1. A Principal Designer: and
2. A Principal Contractor

If an appointment is not made, the client must fulfil the duties required of the relevant roles.

The Principal Designer will assess competency of the members if the team and produce and Initial PCI document. Additionally, the contractor is required to:

* Assess the competency of appointed Sub-contractors and related resources.
* Develop and update Health and safety Plan during the Construction Phase.
* Coordinate all Sub-contractors’ activities, making sure that these are compliant with the health and Safety Plan and Health & safety legislation.
* Advise Sub-contractors on potential residual risks from the design process.
* Ensure site security.
* Undertake duties in respect of provision of information, consultation with others involved in the projects and training as required.

## Pre-construction Information – (PCI)

The PCI complied and issued by the Principal Designer will be developed and incorporated by the contractor into their construction phase health and safety plan with information provided by the designers, client, sub-contractors’ Risk Assessments and sub-constructors Method Statements that outline their procedures for management and mitigation of health and safety risks.

# Design Management

## Design Management Procedure

have been appointed by Leatherhead School Trust to fulfil the role of lead designer up to RIBA stage 2 and thereafter Leatherhead Building Co as part of their D&B Framework PCSA and will be responsible for managing the balance design process in strict accordance with the requirements of Leatherhead School Trust.

Design Management is the application of project teams during the design phases of a project to assure that the design is optimised, fully meets the brief, and is advanced to support the achievements of the overall project schedule.

The Design Team will incorporate the clients design requirements / standards as appropriate for the infrastructure development.

## Design Programme

Development of the design will be managed to enable compliance with the detailed programme requirements. The Lead Designer is required to develop a detailed programme for the execution of the design process. The programme should be updated regularly and shown planned against actual progress. The design programme should refer and provide for Client sign-off / approval and where key decisions are made (e.g., Special Development Order).

## Design Standards

The Design Team will incorporate the clients design requirements / standards as appropriate for the programme of works as per DfE Output Specification – General Design Brief and DfE Output Specification Technical Annexes (refer to Appendix E).

Where there is conflict between DfE and Leatherhead School Trust requirements, Leatherhead School Trust requirements will take precedence.

## Requests for Information

During the design stages, all requests for information (RFI) by the design team will be issued to the KBR Lead Project Manager. The RFI will be assigned a number and recorded on a tracking register. The KBR Lead Project Manager will be responsible for obtaining responses, logging these on the register and distributing to the team.

RFIs and responses will be tracked at the progress meetings and estimated response dates for all outstanding RFIs will be presented at each meeting.

# Commercial & Procurement

The management of procurement on the project will be undertaken in accordance with Leatherhead School Trust procurement procedures.

The procurement route for the main contractor is two- Design and Build. The main design and build contactor (Leatherhead Building Co) are to be appointed through a direct call-off from the Scape Framework (pre- and post-contract).

A Pre-Construction Service Agreement (PCSA) will be agreed with the Contractor to carry all Stage 2,3 4 RIBA Stages, as well as Planning application (and approval) and will provide a cost proposal to move the Contract into Construction. At date of this report Leatherhead Building Co have prepared a final draft of a PCSA for agreement by Leatherhead School Trust.

Subject to agreement between the parties, following completion of design, obtaining of planning permission and an agreement on Contract value, programme and terms, Leatherhead Building Co would then be appointed to deliver the construction phase of the project on a NEC 4 form of Contract.

## The procurement strategy on which this cost plan is based is:

1. The Contract Strategy for the main construction works being based on a single stage design and build contract utilising the SCAPE framework.
2. Assumed Sectional completion in respect of the main building contract.
3. The tender price/contract sum is obtained through competitive tendering of trade packages as per SCAPE requirements.
4. The use of the NEC 4 standard form of contract with no significant amendments.
5. Liquidated/Delay damages being set at levels that are commercially acceptable to the main contractor

## Compensation Events

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# Surveys and Statutory Permissions

## Surveys & Activity Schedule

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| --- | --- |
| Survey Type | Date Completed or Forecasted |
| Topography | 27/02/2023 |
| Site Investigation | 27/02/2023 |

## Building Control and Statutory Approvals

Leatherhead School Trust will secure all regulatory approvals as required for construction to commence, including Building Regulations approval, and Fire Officers approvals and any pre-commencement planning conditions (if agreed with the Leatherhead School Trust these should be undertaken as part of this contract under a compensation event). Leatherhead Building Co shall use the South England Building Control, in this instance Surrey working in conjunction with Leatherhead Council name and Community Services, to obtain advice and approvals.

Building Regulation Registration application date is 27/11/2022

## Construction Strategy

The design team will develop the client requirements in accordance with current applicable space standards, British Standards, Building Regulations, and all relevant statutory regulations.

## Landlord’s Consent

Landowner consent for the development to be made available from 27/01/2023.

## Third Party Approvals

Where any third-party approvals / consent / permission or other are required, these should be brought to the attention of the Surrey City Council and KBR Lead Project Manager at the earliest convenience.

Where a requirement is identified for a third-party approval, this should be addressed at the earliest opportunity to avoid any unnecessary delay within the project delivery process, particularly, where legal input is required.

# Handover Management

## Commissioning and Handover

Handover will occur at the end of any sectional completion and / or the construction phase following completion of the works and resolution of all outstanding issues.

A handover management plan will be agreed with Leatherhead School Trust in conjunction with the principal designer and client health and safety advisor.

The project team will expect the Principal Contractor(s) to provide a complete, minimal defects, operational site that is safe to occupy on practical completion.

It is the responsibility of the contractor to identify and clear any snags before offering the site to the client team for inspection where they will accept / not accept the snag.

Once practical completion is certified the site is handed over to the client and will be subject to the defect liability period identified in the building contract.

## Testing and Commissioning

Prior to completion of the works, Contractors will be required to complete a thorough testing and commissioning procedure in line with requirements specified in contract documentation.

## Health and Safety File

The Health and Safety File will be prepared by the Principal Contractor and checked / authorised by the Principal Designer, prior to delivery to the Client. The file will contain statutory requirements that detail issues related to the construction, operation, maintenance, future adaptation, and eventual demolition of the facility to ensure safety. This will include certification of compliance with standards and regulations, including test certification.

## As Built Drawings and O&M Manuals

At completion, as built drawings and operational and maintenance manuals will be provided to the Client.