

















	Gateway 1		Gateway 2			Gateway 3			
TCE Model	Identify Value	Create Value	Deliver Value	Maintain Value					
	Strategic Definition 	Preparation and Brief 	Concept Design 	Developed Design 	Technical Design 	Construction 	Handover and Close Out 	In Use 	
Core objectives, brief and outcomes	<p>Identify client's Business Case and Strategic Brief and other core project requirements.</p> <p>Confirm the Investment strategy and vision for the opportunity</p> <p>Review and confirm 'Corporate Objectives'</p> <p>Seek and gain initial 'Board Approval' or 'financial authority' required to commence work</p> <p>Seek and gain approval for 'Development Appraisal' in line with 'corporate objectives'</p> <p>Agree responsibility for delivery of work-stages between Asset and Development.</p>	<p>Develop Project Objectives, including Quality Objectives and Project Outcomes, Sustainability Aspirations, Project Budget, other parameters or constraints and develop Initial Project Brief. Undertake Feasibility Studies and review of Site Information. Agree and document the investment and disposal considerations, effectively communicate this to allow implementation by the team.</p> <p>Agree and document the project brief and strategic objectives for the opportunity</p> <p>Undertake and deliver scheme viability studies and review against those approved in Stage 0</p> <p>Agree milestone timetable for delivery of the opportunity either by acquisition, land assembly or vacation into the development pipeline.</p> <p>Undertake site research, identify key constraints and opportunities</p> <p>Establish key stakeholders</p> <p>Identify and establish team</p>	<p>Prepare Concept Design, including outline proposals for structural design, building services systems, outline specifications and preliminary Cost Information along with relevant Project Strategies in accordance with Design Programme. Agree alterations to brief and issue Final Project Brief.</p>	<p>Prepare Developed Design, including coordinated and updated proposals for structural design, building services systems, outline specifications, Cost Information and Project Strategies in accordance with Design Programme.</p>	<p>Prepare Technical Design in accordance with Design Responsibility Matrix and Project Strategies to include all architectural, structural and building services information, specialist subcontractor design and specifications, in accordance with Design Programme.</p>	<p>Offsite manufacturing and onsite Construction in accordance with Construction Programme and resolution of Design Queries from site as they arise.</p>	<p>Handover of building and conclusion of Building Contract.</p>	<p>Undertake In Use services in accordance with Schedule of Services.</p> <p>Tenant Leases to reflect requirements for compliance with TCE Fit-out Guide</p> <p>Fit-outs carried out by Tenant's project teams in accordance with Tenant Leases</p>	
Investment strategy and Financial approval	<p>Financial Authority 1</p> <p>Seek and agree Financial Approval for Gateway 1: Strategic Definition, Briefing Feasibility & Viability (Stage 0 & 1)1.</p> <p>Set up budget on Agresso system and confirm Purchase Order numbers.</p> <p>Table Appraisals and Viability study.</p> <p>Seek & agree Financial Approval for Gateway 2: Concept Design through to Planning Consent</p> <p>Update Agresso system and confirm Purchase Order numbers as necessary</p>		<p>Financial Authority 2</p> <p>Gain Approval for Appraisal to inform further Budget Approvals.</p> <p>Seek & agree Financial Approval for Gateway 3 : Design completion and delivery</p> <p>Update Agresso system and confirm Purchase Order numbers as necessary</p> <p>Review monthly 'Forecast Budget' against 'Approved Budget', highlight risk areas and review level of approval as required.</p> <p>Quarterly Appraisal update to inform project and corporate reporting.</p>			<p>Financial Authority 3</p> <p>Review monthly against Approved Budget, highlight risk areas and review level of approval as required.</p> <p>Produce a 'draft final' appraisal to allow budget reconciliation.</p>			
Sustainability, future proofing, end user requirements	<p>Sustainability checkpoint 0</p> <p>Re-confirm 'TCE material Issues in context of Corporate Sustainability targets..</p> <p>Issue: TCE Sustainability Principals / Guidance / Action Plans</p> <p>Undertake review of likely lifecycle of opportunity, incl. consideration of major future proofing considerations</p>	<p>Sustainability checkpoint 1</p> <p>Sustainability Workshop. Team complete DSP reporting Template, set targets, gain approval for Project Specific Sustainability KPI Targets</p> <p>DSP Quarterly reporting</p> <p>Operational input into briefing process (lessons learned).</p> <p>BM to produce Management Strategy</p>	<p>Sustainability checkpoint 2</p> <p>Test impact of Sustainability Targets on overall project KPIs (cost, programme, etc)</p> <p>Finalise KPI targets</p> <p>Scope of ecology proposals reviewed by Masterplan Ecologist (Arup)</p> <p>DSP Quarterly reporting</p>	<p>Sustainability checkpoint 3</p> <p>DSP Quarterly Reporting</p> <p>Sustainability Statement for Planning (should reflect DSP reporting). Attachments should include DSP doc and Ecology Masterplan (London devs)</p> <p>Detailed Building Management Plan produced by BM/FM. Aligned with DD proposals from design team</p> <p>Metering Strategy to be reviewed and signed off by BM/EM</p> <p>BM/FM review / sign off DD proposals</p>	<p>Sustainability checkpoint 4</p> <p>DSP Quarterly Reporting</p> <p>Include specific Contractor Requirements in relation to sustainability KPIs within tender documentation</p> <p>Design Case Studies</p> <p>Commissioning programme & Procedures defined (contractor) and reviewed (Consultant / FM)</p> <p>Training and Handover Process defined (contractor) and reviewed (Consultant / FM)</p>	<p>Sustainability checkpoint 5</p> <p>DSP Quarterly Reporting</p> <p>Contractor briefing on sustainability vision and KPIs. Confirm reporting procedures during construction stage.</p> <p>Construction Case Studies</p> <p>Contractor briefing on SL process</p> <p>Commissioning witnessed by Consultant and FM</p> <p>Independent validation of commissioning</p>	<p>Sustainability checkpoint 6</p> <p>Final DSP Quarterly Reporting</p> <p>Review / lessons learnt workshop</p> <p>Training and Handover as per defined process</p>	<p>Sustainability checkpoint 7</p> <p>Post Occupancy Evaluation</p> <p>Validation of all KPIs</p> <p>In Use Case Studies</p> <p>Seasonal Commissioning (Contractor, witnessed by Design Team / FM)</p> <p>Post-occupancy Evaluation – Occupant Satisfaction Survey</p> <p>Review of Fit-Out proposals (Design team / FM)</p> <p>Commissioning Validation (Landlord Systems)</p>	
Corporate and stakeholder engagement	<p>Identify key stakeholders, agree level of Corporate engagement</p> <p>Draft Communications and PR strategies covering:</p> <ul style="list-style-type: none"> - External engagement stakeholder management - CSR events, community relations. - Press & Media protocol 		<p>Assist in drafting Planning Consultation Strategy</p> <p>Agree PR and event strategy and target milestones</p>			<p>Agree Award profile, and entries, schedule launch events and target milestones</p> <p>Completion events</p>			
CSR, community initiatives* Events	<p>Identify opportunities and requirements in the local community</p> <p>Prepare Statement of community involvement</p>								
Town planning and conservation**	<p>Briefing and engagement of strategic advisors.</p> <p>Identification of key issues, relevant policy context to inform viability studies</p> <p>Identify key stakeholders and interest groups</p> <p>Pre-application & Consultation strategy informed by the above. Exhibitions as necessary</p>		<p>Planning applications are typically made using the Stage 3 output. A bespoke The Crown Estate Plan of Work will identify when the planning application is to be made.</p> <p>Points to consider:</p> <ul style="list-style-type: none"> - Planning, listed building, application for works in Conservation area - Review of 'draft conditions' - Agreements S106, 278 and associated contributions - Review of client contingency against risk profile - Pre-tender estimate 						

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Programme	Establish Project Programme . Opportunity 'work towards block date' in line with Investment Strategy. Compile 'Land assembly schedule' and 'VP milestones'.	Review Project Programme Table and agree 'Strategic programme' incl. constraints Confirm short term programme to inform request for 'Board Approval' or 'Financial Authority'. Table and agree Design Programme	Review Project Programme . Monitor & report against strategic programme Agree target timetable for Planning scheme and planning certainty.	The procurement route may dictate the Project Programme and may result in certain stages overlapping or being undertaken concurrently. A bespoke The Crown Estate Plan of Work 2014 will clarify the stage overlaps. The Project Programme will set out the specific stage dates and detailed programme durations. Ie 1. Strategic Programme 2. Contract Programme (s) feeding into Strategic Programme 3. Key milestone dates in each stage				
Procurement - Appointments / Professional Team	Initial considerations for assembling the project team Follow procedures in the Urban Estate Procurement Manual Review relevant consultant framework agreements	Prepare Project Roles Table and Contractual Tree and continue assembling the project team Definition of roles & responsibilities (SL)	The procurement strategy does not fundamentally alter the progression of the design or the level of detail prepared at a given stage. However, Information Exchanges will vary depending on the selected procurement route and Building Contract . The procurement strategy will be defined by the scale and complexity of the project, and the market conditions that the project will be placed into. Where JV partnership or external funding is secured it is likely that guaranteed or fixed price mechanism will be sought. A bespoke The Crown Estate Plan Procurement Strategy will set out the specific tendering and procurement activities that will occur at each stage in relation to the chosen procurement route covering: - Proposed Procurement route - Proposed 'Form of Contract' - Balance of Risk Transfer, identifying client risk items - Review of client contingency against risk profile - Pre-tender estimate - Consideration should be given to early pre-construction advice, market testing and initial engagement with the 'supply chain'		Administration of Building Contract , including regular site inspections and review of progress. Definition of Construction stage responsibilities in relation to: - Design Completion - Models & Mock ups - Benchmarks & Samples - Pre-construction activities - Sustainability and soft landings	Conclude administration of Building Contract .		
Information exchanges/BIM **/ 3D Modelling	Strategic Brief Draft strategic briefing for use of BIM / 3D Modelling Feed into procurement stream and requirements of appointments	Initial Project Brief . Consider & document capability of team where 3D modelling / BIM utilised. Include specification for Operational BIM Model aligned with FM capability (SL) Confirm procurement strategy, agree level of development (LOD specification)	Concept Design including outline structural and building services design, associated Project Strategies , preliminary Cost Information and Final Project Brief .	Developed Design , including the coordinated architectural, structural and building services design and updated Cost Information .	Completed Technical Design of the project Tender to include requirements for Construction stage information, including: - BIM LOD - O&M Manuals - User Guides	'As-constructed' Information . O&M Manuals produced (contractor) and reviewed (Consultant / FM)	Updated 'As-constructed' Information . Operational BIM Model produced and handed over	As-constructed' Information including O&M Manuals and Operational BIM Model updated in response to ongoing client Feedback and maintenance or operational developments Tenant's project team to update O&M Manuals including BIM model (review – Design Team / FM)
Health and safety	Set Strategic Brief & review Corporate Targets	Agree and define corporate targets		Agree reporting protocol and accident reporting procedure		Complete Standard Monthly Reporting by Monthly Return. Monitor and report positive, initiatives and performance.		
Legal - Title & Property matters - Funding requirements - Consultant Appointments - 3rd Party agreements (RoL / P Walls / scaffold, over-sailing, / wayleaves etc/ - Statutory Agreements) - Insurances								
The Crown Estate Governance, Policy matters and Guidance Notes	See reference documents.) Ie - Investment Guidelines - Ethical procurement Policy - Urban Estate Procurement Manual - Development Sustainability Principles	Set up project meetings and document as per guidelines Follow guidelines on Financial Authority & Development Appraisals Standard Approved Consultant appointments Tendering practice for project s development Payment procedure & Purchase Order system		Tendering practice Building Contracts & standard forms Health & Safety Policy & procedures Roles & Responsibilities Reporting Requirements Construction Insurances: Policy & Procedures		Construction Insurance Policy & Procedures		The Crown Estate Fit-Out Guides: Office & Retail Retail Tenant Guidelines Licence for alterations Guidance for Managing Agents – Developing and Implementing Sustainability Action Plans Sustainability Guidance – minimum requirements for refurbishment