

South East & London Construction Framework for  
Major Projects

Invitation to Mini Competition

Binfield Learning Village at Blue Mountain  
Bracknell Forest Council



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## Part A Instructions to Tenderers

The tenderers must read this document in conjunction with the Conditions of Tendering in Appendix 16.

### 1. Basis of Procurement

The South East and London Framework Agreement for Major Projects operates a two stage appointment process.

#### Stage 1; Mini Competition

Contractor selection is by mini competition to provide pre-construction services on a fee basis, including open book sub contract tendering and culminating in the Contractor's Proposals.

#### Stage 2; Works Contract

Acceptance is by the Contracting Authority of the Contractor's Proposals and award of the works contract.

#### Background

Bracknell Forest Council is seeking to appoint a single framework Contractor on the basis of a pre-construction agreement, and the JCT Framework Agreement entered into following the issue of the OJEU Award Notice 2011/S 145-239869.

- 1.1. The Contractor will be appointed on the basis of a single pre-construction agreement in the form set out in Appendix 10 (the "Agreement") to discharge the pre-construction services by working collaboratively with the Authority's employer's agent during the pre-construction stage to fulfil the duties set out in Part C of this document.
- 1.2. Following successful completion of the pre-construction stage, the Authority intends to enter into a construction contract in the form set out in Appendix 11. At the Authority's discretion the Authority may also enter into an Enabling Works Contract with the Contractor in the form set out in Appendix 12. The Authority reserves the right to enter into a separate Contract on the same terms for Refurbishment of the Club House for Community Facilities. The Authority will confirm the inclusion of the Community Facilities under Part 2 of the Mini-Competition.
- 1.3. The Mini Competition is for the works described in this document. Your return shall conform to the requirements set out in these documents and shall be exclusive of Value Added Tax (VAT).

### 2. Process

This process is in two Parts.

- 2.1. **Mini Competition Part 1**; is a 'light touch' designed to assess the tenderer's proposed team and appreciation and understanding of the project and service proposals.

Complete the **MINI COMPETITION PART 1 TEMPLATE** (Appendix 5) to either confirm your tender, or to confirm you wish to decline this opportunity. Return the template to the Contracting Authority.

Bracknell Forest Council will evaluate the returns for Mini Competition Part 1 in accordance with the evaluation criteria. The top scoring 3 tenderers will be invited to complete Mini Competition Part 2. This is a hard gate.

- 2.2. **Mini Competition Part 2**; tests the tenderer's project specific approach, understanding and engagement with the project. This part also tests the tenderers financial response to Overhead and Profit, Insurance and London Weighting percentage uplifts and project specific pre-construction and construction management resources and costs and indicative preliminaries costs.

The scores from Mini Competition Part 1 are carried forward to Part 2.

Complete the **MINI COMPETITION PART 2** in accordance with instructions detailed in the evaluation guide (Appendix 8) Pricing and Resource Schedules (Appendix 7) to confirm your tender and return it to:

### 2.3. Evaluation Criteria (Scoring)

The weighting criteria for this Mini Competition, is set as follows:

The weighting for Mini Competition Part 1 are typically set as follows:

- Availability Yes/No (see Appendix 5)
- Available resource & project understanding %

The weighting for Mini Competition Part 2 are typically set as follows:

- Technical criteria %
  - *Financial criteria* %
- TOTAL** %

**The total combined score from Part 1 and Part 2 will be %, consisting of Quality and Financial criteria. The tenderer with the highest score out of % will be awarded the contract.**

## Part B Project Description

### 1.0 Project Details

<b>Project Name</b>	:	Binfield Learning Village at Blue Mountain
Description of Work	:	New Build (majority of the works) / Part Refurbishment (optional)
Contracting Authority	:	Bracknell Forest Council (BFC)
Geographical Location	:	Bracknell Forest
Contracting Authority Contact :		
iESE Contact	:	
Programme	:	Education – All-through School with integrated SEN provision. Optional standalone Community Facilities.
Current Forecast	:	
Form of Contract	:	Design and Build
Current RIBA Stage	:	RIBA Stage 1/B
Return Mini Competition		
Part 1 template	:	
Return Mini Competition		
Part 2	:	
Contractor Selection Due :		
Planning Approval anticipated:		
Start on Site	:	
Anticipated Completion	:	
Form of Contract	:	JCT Design and Build 2011 with amendments

The Underlying Contracts or the latest revision or version of the contracts at the time of tendering an underlying contract shall be those specified below together with the special terms and conditions set out or referred to in Appendix 11 in the Framework Agreement.

#### **JCT Agreement:**

Design and Build Contract 2011 with amendments – Appendix 12

**Pre-Construction Agreement as included in the Framework Agreement as Appendix 10 with amendments.**

### 1.1 Professional Team :

The client team mainly will consist of the following team:

	Programme Director	BFC
	Programme Manager	BFC
	Head of Procurement	BFC
	Chief Technical Accountant	BFC
	Head of Property (Education)	BFC
	Head of Community Engagement	BFC
	Head Teacher Review Group	BFC Schools
-	Quantity Surveyor	BFC Consultant - Atkins
	Technical Advisor / Peer Review Team (architect, mechanical, electrical, structural, CDMC and landscape resources)	BFC Consultants - Atkins

### 1.2 Project Specific Comments :

Project specific brief is attached in Appendix 9, which forms part of the mini-completion documentation. Client requirements listed within the brief must be met.

## 2.0 Procurement Route

2.1 The procurement route is:

Design & Build with Contractor Design Team

2.2 Organisation / Responsibility

RIBA Stages	A / B		C / D		E to L	
	Client	Contractor	Client	Contractor	Client	Contractor
<b>Project Manager</b>	✓		✓		✓	
<b>PQS</b>	✓		✓		✓	
<b>CDMC/Principal Designer</b>	✓			✓		✓
<b>Clerk of Works</b>					✓	
<b>Architect</b>	✓			✓		✓
<b>Mechanical</b>				✓		✓
<b>Electrical</b>				✓		✓
<b>Structural</b>				✓		✓
<b>BREEAM Assessor</b>				✓		✓
<b>Part L Assessment</b>				✓		✓
<b>Acoustician</b>				✓		✓
<b>Planning Consultant</b>				✓		✓
<b>Pre-Construction Duties</b>				✓		✓
<b>FFE</b>				✓		✓
<b>ICT</b>				✓		✓
<b>Fire Risk Assessment</b>				✓		✓
<b>Transport Assessment</b>				✓		✓
<b>Landscape</b>				✓		✓

\*CMDC TA role to be part of client team; Principal Designer to be part of contractor's design team.

## 3.0 Project Information (drawings and documents) – Appendix 1

3.1 The draft site masterplan is attached. The design for the Learning Village, community facilities and the surroundings must take into account some flexibility to accommodate a masterplanning approach.

3.2 Due to on-going discussion with the current site owner, the red lines for the Learning Village and the Community Facilities are likely to change over the next few months. Hence some elements of the masterplan (e.g. boundary treatments) prior to and during the commencement of the detailed design phases are likely to be fluid. Site access is unavailable until .



3.3 Feasibility study for the Learning Village completed by Atkins on behalf of the Council is attached.

3.4 LIDAR survey of the site is attached.

#### **4.0 Programme**

The project plan is provided at Appendix 2.

#### **5.0 Project Cost Plan/Preliminaries**

The current project cost plan is included at Appendix 3.

Details of project specific preliminaries are included at Appendix 4.

#### **6.0 Cost-Time Benefits Matrix**

The cost-time benefits template is provided at Appendix 6.

## **Part C Duties of the Framework Contractor**

### **1 General Matters**

Project-specific pre-construction services are set out in Appendix 9;

- 1.1 The successful Contractor will discharge the pre construction services, working with the Contracting Authority and their Agents openly and collaboratively to develop and complete the design.
- 1.2 The successful Contractor will report directly to – Blue Mountain, Bracknell Forest Council.

### **2 Adherence to Quality Assurance Processes - Team Performance & Gateway Reviews**

- 2.1 These will be conducted as workshops with each party presenting on their respective responsibilities and outcomes for the stage under review. Consideration should be given to integrating the Contracting Authorities own Quality Assurance processes. The meeting style should be fluid and flexible to facilitate full team interaction, engaging the key decision makers.

Reviews will be organised at key stages of the project:

- At stage B (RIBA 1) – Gateway 1 – Feasibility
  - At stage D (RIBA 2) – Gateway 2 – Scheme design
  - At stage H (RIBA 3) – Gateway 3 – Contract formation
  - At stage K (RIBA 5) – Gateway 3.5 – Mid Construction
  - At stage L (RIBA 6 /7) Gateway 4 – Post construction
- 2.2 Each review is subject to a formal sign off by Bracknell Forest Council's Chief Officer, SREI and undersigned / witnessed by all present.
  - 2.3 Out-turn Key Performance Indicators (KPIs) shall be assessed at 360 degree Team Performance Reviews included as part of these meetings:
    - At Stage H (RIBA 3) – end of Pre-construction period
    - At Stage L (RIBA 6 /7) – Post-construction.
  - 2.4 Framework Contractor will be responsible for updating iESE Framework Management team using web based database.

## Part D Mini Competition Part 1

Based on the project information detailed in Part B & C and the appendices 1 to 15, provide a return for mini competition.

Use the template in Appendix 5 and return it to the Contracting Authority by the return date.

We are not asking for variant tenders. If provided, these must be clearly related to the appropriate template and fully justified.

### 1. Availability Yes / No

Confirm whether you wish to submit a mini competition for this project. Use the template in Appendix 5.

(One page limit for question 1.1 plus two page limit for all CVs and one page for organogram.

Two page limit for question 1.2 including [one page for 1.2.1 and one page for 1.2.2]

Arial, font size 11)

#### 1.1 Available Resource

Provide details of your proposed project team, its structure and availability (including designers where relevant) for the pre-construction and construction Stages (provide an organogram for pre-construction and construction stages). Demonstrate your project team's specific experience and appropriateness of providing works relevant to the requirements of this particular project. Set out how you will manage the transition from the pre-construction to construction teams.

Score <<%>>

#### 1.2 Project Understanding

Provide your responses to the questions relating to the project understanding aspects of the project.

1.2.1 Please comment on the programme identified in the ITT for the scheme and confirm you will deliver to it. Describe in detail how you would manage the scheme to deliver the key pre-construction milestones along with coordination with various internal and external stakeholders.

Score <<%>>

1.2.2 The construction market in the UK, and specifically locally to Bracknell Forest is undergoing pressures of inflation unprecedented in recent years. How would you and your supply chain ensure that cost certainty gained at Gateway 1 and 2 is maintained through to Gateway 3 and a contract sum?

Score <<%>>

**The scoring for this section will be weighted % of the overall total score.**

## Qualitative Assessment – Part 1

**Assessment of Question 1: Yes/No question must be answered as Yes for the tenderers response to be considered and scored. If answered as No, then the tender will be rejected.**

Each of the Part 1 questions will be marked separately, by members of the Evaluation Panel. A moderation process will then be followed to arrive at a consensus score for each sub-criteria (out of 5) which is then weighted in order to arrive at a final score for Part 1 using the weightings set out above.

**Example 1:** Question 1.1 has a maximum weighting of %. A score of Very Good would be 4. The score of 4 would then be adjusted to a mark out of %, i.e.  $4 \times (10/5) =$  .

**Example 2:** Question 1.2.1 has a maximum weighting of %. A score of Very Good would be 4. The score of 4 would then be adjusted to a mark out of %, i.e.  $4 \times () =$  .

The total weighted score for Part 1, a sum of the scores for each sub-criteria, is expressed as a percentage of the maximum possible score of %.

The top three scoring tenderers will be short-listed and progress to Part 2.

## Part E Mini Competition Part 2

Based on the project information detailed in Part B & C and the appendices 1 to 15, provide a return for mini competition.

### 2.0 Social Responsibilities

In response to framework objectives the contractor and its supply chain will be required to actively participate in the achievement of social objectives relating to participation in skills development and training. To this end, Tenderers are required to complete an Employment and Skills Plan (ESP) and Method Statement as outlined in in appendix 4A. Template benchmarks are also provided in Appendix 4A for the minimum outcomes for the ESP.

- 2.1 A completed ESP is enclosed with this submission. Yes / No  
 2.1.1 If yes confirm the ESP meets the template minimum benchmark. Yes/No  
 2.1.2 If no explain the reason for the variation.

Score PASS / FAIL

### 3.0 Technical Criteria

Provide your responses to the questions relating to the technical aspects of the project.

(Two page limit for each question including any sub-questions for Part 2. Arial font size 11)

3.1 Based on the process chart in Diagram 1 of the mini-competition Appendix 9, please detail:

- 3.1.1 how you will engage the design team on a weekly basis? Please outline the approach you will take during the pre-construction stage for progressing the design collaboratively with the client and other statutory and non-statutory stakeholders.  
 3.1.2 how you could improve the design process based on the diagram.  
 3.1.3 how will you approach the multi-disciplinary design process to ensure risk pricing is kept to a minimum and competitive pricing is maintained?

Score %  
**(all three parts are equally weighted to % each)**

3.2 Explain how you will ensure the design integrity and quality of the scheme will be achieved through energy efficiency and low lifecycle cost in order to achieve an innovative educational layout, and aesthetic value.

Score %

3.3 Provide evidence on how you would engage with you supply chain to ensure that price certainty is achieved in parallel with design progression. List the confidence percentage at various stages you will aim to achieve on the contract sum e.g. 60% by RIBA stage 2 and 90% by RIBA stage D.

Score %

3.4 Provide commentary on what is your understanding of the risks relevant to successfully delivering this project at the best value, on time and of a good quality? Which are the greatest risks, explain how you propose to deal with these and what previous experiences do you have of dealing with this type of risk?

Score %

3.5 Describe your methodology for the use of BIM in the project? How will you ensure that the client and other stakeholders are fully involved in the process from a very early stage?

Score %

Overall Section Score %

**The scoring for this section will be weighted % of the overall total score.**

#### **Qualitative Assessment – Part 2**

**All Pass/Fail questions must receive a score of Pass for the tenderer to remain in competition. If a score of Fail is awarded against such questions e.g. Q2.0, then the tender will be rejected.**

Each of the Part 2 questions will be marked separately, by members of the Evaluation Panel. A moderation process will then be followed to arrive at a consensus score for each sub-criteria (out of 5) which is then weighted in order to arrive at a final score for Part 2 using the weightings set out above.

**Example 3:** Question 3.2 has a maximum weighting of %. A score of Very Good would be 4. The score of 4 would then be adjusted to a mark out of %, i.e.  $4 \times () = .$

**Example 4:** Question 3.4 has a maximum weighting of %. A score of Very Good would be . The score of 4 would then be adjusted to a mark out of %, i.e.  $x () = .$

The total weighted score for Part 2, a sum of the scores for each sub-criteria, is expressed as a percentage of the maximum possible score of %.

**The total combined Quality Score from Part 1 and Part 2 will be %, consisting of % and %, respectively.**

#### 4.0 Financial Criteria

(One page limit per question relating to 4.1; 4.2.2; 4.2.4; 4.2.5.2; 4.2.5.3; Arial, font size 11)

Provide the financial information in relation to the project. Tenderer responses will be determined on a project by project specific basis.

**4.1** Based on the cost plan, programme and scope of information provided, the tenderer is to comment on and evidence their ability to deliver the project to the stated cost plan highlighting the top three risks and how these would be mitigated.

Score

**Pass/Fail**

#### 4.2 General Instructions

Complete the cost submission in accordance with the instructions set out below.

Template	Type	Procurement type	Value
4.6	New build secondary school complete with temporary school	D & C	

Provide a financial return for mini competition using excel workbooks. Benchmarking project specific costs and resources back to the original template.

##### 4.2.1 Pre-construction Stage Management Structure and Costs

Submit a fully costed resource schedule for pre-construction management services in line with the activities in Part C from RIBA Stages 1/B on the template provided at Appendix 7. Base resource allocation on the programme contained within Appendix 2. Carry forward the total to Summary tab in Workbook of Appendix 7.

**Score**

Carry forward to the financial section total score.

**4.2.2** Provide a clear explanation of resource build up and reference back to the original template project in the OJEU ITT.

**Score**

**Pass/Fail**

##### 4.2.3 Construction Stage Management Structure and Costs

Submit a fully costed resource schedule for construction management services and costs for RIBA Stages J to K (mobilisation and construction) and Stage L (completion/rectification) on the template provided at Appendix 7 base resources on the programme contained within Appendix 2. Carry forward the total to Summary tab in Workbook of Appendix 7.

**Score** Carry forward to the financial section total score.

**4.2.4** Provide a clear explanation of resource build up and reference back to the original template project in the OJEU ITT.

**Score** **Pass/Fail**

**4.2.5 Project Specific Preliminaries**

4.2.5.1 Submit Project Specific Preliminaries information using the template provided at Appendix 7. Price each item. Base preliminaries costs on the programme contained within Appendix 2. Carry forward the total to Summary tab in Workbook of Appendix 7.

**Score** Carry forward to the financial section total score.

4.2.5.2 Identify the level of responsibility you will place on your supply chains to provide preliminary items and detail costs.

**Score** **Pass/Fail**

4.2.5.3 Provide a clear statement identifying how site set-up, access and material handling strategy impact of preliminary costs.

**Score** **Pass/Fail**

**4.2.7 Insurances**

Carry forward the total of the Insurances Costs using core framework pricing information. Carry forward the total to Summary tab in Workbook of Appendix 7.

**Score** Carry forward to the financial section total score.

**4.2.8 OH & P and The Fee**

Carry forward the total of the OH & P Costs using core framework pricing information. Carry forward the total to Summary tab in Workbook of Appendix 7.

**Score** Carry forward to the financial section total score.

Carry forward all Costs to the Pricing Summary – Appendix 7.

**The scoring for this section will be weighted % of the overall score.**

**Financial Assessment**

**All Pass/Fail questions must receive a score of Pass for the tenderer to remain in competition. If a score of Fail is awarded against such questions e.g. Q4.1, then the tender will be rejected.**

**Total of the Summary Tab in the Workbook in Appendix 7 (amount carried forward to the Form of Tender) will be used to calculate the % overall Financial section score based on the following criteria:**



The Tenderer that submits the lowest bona fide total tender price will receive the maximum price score of %. Prices of the other Tenderers will be scored based on the following formula:

$$\frac{\text{Lowest total tender price submitted}}{\text{Tenderer's total tender price}} \times \%$$

**Example 5:**

The Council reserves the right to reject any tender which is abnormally low. Such tenders will be treated in accordance with the requirements of the Public Contracts Regulations 2006 for abnormally low tenders.

**5.0 Cost-Time Benefits Matrix**

Carry forward the Client's cost plan onto the Cost Time Benefits template matrix – Appendix 6. **Note this is not scored.**

**Important Note**

Provide realistic costs as all variations in cost from this tender will be monitored at contract formation and final account stage and reported as a cost predictability KPI.

**Appendix 1 Project Information**

Site Masterplan

LIDAR Survey

Feasibility Study

Planning – Letter of Comfort

Equal Opportunities Policy

Desktop Survey information

**Appendix 2 Project Programme**

**Appendix 3 Cost Plan**

**Appendix 4 Key Details of Preliminaries**

## Appendix 4A Employment Skills Plan

You must complete and return the Employment Skills Plan (ESP) template. As part of this submission it is mandatory to complete parts 4, 5 and 6 of the ESP. The remaining sections can be completed as part of your pre construction responsibilities. You should refer to the appropriate iESE project template (Appendix 4a ii) for the benchmark minimum outcomes expected (These are based on the National Skills Academy Client-Based approach guidelines). For parts 4, 5 and 6 one “outcome” equates to one training placement of a minimum of 10 weeks. Apprentice starts are persons employed under the CITB shared apprenticeship scheme (SAS), Existing apprentices are persons employed direct by the contractor or its sub-contractors. Where the minimum existing apprentices cannot be achieved the shortfall should be added to the apprentice starts. You should include a brief statement detailing the works packages where apprenticeship placements are expected to be provided.

### Appendix 4A (i) - SEaL Employment and Skills Plan Template

Employment and skills areas		Total Outcomes	SAS	Contractor	Supply Chain
1.	Work placements (16+) persons				
2.	Work placements (14 - 16) – persons				
3.	Curriculum support activities - individual engagement				
4.	Graduates – persons				
5.	Apprentice starts – persons				
6.	Existing apprentices – persons				
7.	Apprentices completions – persons				
8.	Jobs advertised through local employment vehicles – number				
9.	NVQ starts for sub-contractors – persons				
10.	NVQ completions for sub-contractors – persons				
11.	Training plans for sub-contractors – number				
12.	Supervisor training for sub-contractors – persons				
13.	Leadership and management training for sub-contractors – persons				
14.	Advanced health and safety training for sub-contractors - persons				

	<b>Appendix 4A(ii) SEaL Framework Template</b>	Template 4.6 New Build Secondary School - D&C
	<b>Value</b>	
	CITB Client Based Approach Appendix C Benchmark Schedule	Sched 6 Band 6
<b>Targeted Outcomes</b>		
1	Work Placement (16 plus years) - persons	16
2	Work Placement (14 - 16 years) - persons	4
3	Construction Curriculum Support Activities - individual engagement	8
4	Graduates - persons	1
5	Apprentice Starts - persons	6
6	Existing apprentices - persons	6
7	Apprentice Completions - persons	4
8	Jobs created on construction projects - number	5
9	S/NVQ Starts for Subcontractors - persons	10
10	S/NVQ Completions for Subcontractors - persons	8
11	Training Plans for Subcontractors - no.	5
12	Supervisor Training for Subcontractors - persons	6
13	Leade4rship and Management Training for Subcontractors - persons	4
14	Advanced Health and Safety Training for Subcontractors - persons	6
	<b>Total Apprentice / Trainee Outcomes</b>	18
	<b>Apprentice / Trainee Outcomes / £m</b>	0.80

**Note: For this project the Council's target for apprentice and trainee outcomes is 1.25FTE / £m, which should be reflected in the tenderer's submission.**

## Appendix 5 Mini Competition Return Checklist

<b>Part 1</b>	
<b>Capacity</b> <ul style="list-style-type: none"> <li>• Availability</li> </ul>	Yes/No
<b>Capability – Available Resource</b> <ul style="list-style-type: none"> <li>• Pre-construction team – provide &amp; attach details of the relevance of proposed team’s experience (pen portraits) including design for this project (call off)</li> </ul>	Yes/No
<b>Appreciation of the project and service proposals – Project Understanding</b>  Response attached	Yes/No
<b>Part 2</b>	
<b>Social Responsibilities</b> – response attached	Yes/No
<b>Technical Criteria</b> - response attached	Yes/No
<b>Financial Criteria</b> - response attached	Yes/No
<b>Formal completion of tender</b>  The following forms have been correctly completed, signed and attached: <ul style="list-style-type: none"> <li>• Form of Tender; (template to follow)</li> <li>• Anti-Collusion Form (template to follow)</li> </ul>	Yes/No
<b>Confirmation that the following documents forming part of the mini-competition have been reviewed prior to submitting a tender:</b> <ul style="list-style-type: none"> <li>• <i>Conditions of Tendering- Appendix 16</i></li> <li>• <i>Project-specific Brief and Schedule of Accommodation Appendix 9</i></li> <li>• <i>ICT &amp; FFE Responsibility Matrix Appendix 9</i></li> <li>• <i>Learning Village Feasibility Study Appendix 1</i></li> <li>• <i>EFA Facilities Output Specification and Area Schedules Appendix 9</i></li> <li>• <i>Pre-Construction Agreement Appendix 10</i></li> <li>• <i>JCT Design &amp; Build Contract with amendments Appendix 11</i></li> <li>• <i>Enabling Works Contract Appendix 12</i></li> <li>• <i>Site Plan Appendix 1</i></li> <li>• <i>LIDAR Survey Appendix 1</i></li> <li>• <i>Planning – Letter of Comfort Appendix 1</i></li> </ul>	Yes/No

## Appendix 6 Cost-Time-Benefits Matrix

This is an iESE templated Microsoft Excel workbook, to be completed by tenderers through the project where The Client team completes the first section

from this document

as indicated by the arrows below

**Title Block**  
**Cost Data**

Benefits Report	Project Name		As Provided for in ITT (Client Advice)			
	Date		RIBA Stage		Date	
Project information	Areas	No of users	User category	Return category	Areas	
	Rebuildment					
IESE Cost-Time	GFA / Total Users					
	Project Costs	Newbuild	Return	Whole Project		Newbuild
		£	£	£	Split by value	£
	Demolition & Alterations					
	Substructure					
	Superstructure					
	Internal Finishes					
	Building Fixed Fixings and Furnishings					
	M&E Services					
	External Works					
	External Utilities Works					
	Abnormals					
	Preconstruction Management Fee					
	Contractors Preliminaries					
	Overheads					
	Profit					
	Inflation					
	Contingency- Contractor					
	Contingency- Client					
	Contractors Design Fees (i.e. CDP or D&B)					
	Professional and Internal Fees & other Client costs					
	Loose FF&E					
	ICT					
	Project Value					
	GFA M²					
	Contract Cost (M2)					
	Cost Benchmarking: Project less Abnormals					
	Project value					
	Automated from numbers above					
	Less Demolition & Alterations					
	Less External Works					
	Less External Utilities Works					

**Appendix 7 Pricing and Resource Schedules (to be completed by the tenderers)**

This appendix comprises an excel workbook:

7.1 – Cost Summary

7.2 – Pre-construction Resource Schedule

7.3 – Construction Resource Schedule

7.4 – Project Preliminaries

**Appendix 8 Mini Competition Evaluation Guide**

Mini competition evaluation guide

Tender Stage Query Form

**Appendix 9 CONTRACTORS PRE CONSTRUCTION DUTIES (RIBA work stages A – H)**

Contractors are required to carry out the following activities and any other deemed necessary by the team for completion of the project, and issue outputs at the appropriate stage as the design and project develops through each RIBA stage. Contractors should develop the outputs in conjunction with the Client's team including all items required for Gateway reviews and update regularly as the design develops and/or further information becomes available. The list below is based upon a contractor being appointed at RIBA stage 1/B.



	RIBA Stage	Description	Contractors Activity	Contractors Outputs
A	Appraisal	Client requirements, feasibility, option appraisals	<ul style="list-style-type: none"> <li>• Not appointed for this stage.</li> </ul>	
B	Design Brief	Development of Design Brief. Identification of procurement method, organisational structure and range of resources required.	<ul style="list-style-type: none"> <li>• Review Feasibility report completed by Atkins</li> <li>• Attend key design team and project meetings (weekly cycle) including Gateway 1 – see Diagram 1</li> <li>• Attend and contribute to value engineering and risk management meeting/workshops</li> <li>• Attend early meetings with Planners, transport, external stakeholders and existing site owners</li> <li>• Identify and highlight project opportunities</li> <li>• Create BIM model</li> <li>• Review and update feasibility, providing advice and challenge on initial design solutions, EIA, BREEAM and cost allowances against benchmark experience including input into whole life costs</li> <li>• Provide initial proposals for procurement strategy</li> <li>• High level programme advice</li> <li>• Highlight programme opportunities by combining projects or forming a programme of work</li> <li>• Highlight risks and concerns on a</li> </ul>	<ul style="list-style-type: none"> <li>• Feasibility report highlighting project issues, risks and opportunities and providing indicative proposals and solutions. The report must include up to three alternative designs which could meet the client requirements within the cost envelope.</li> <li>• Define implications arising from the Environmental Impact Assessment</li> <li>• Evidence of benchmarking of cost and design standards.</li> <li>• Initial risk register identifying key risks from feasibility work with owners, mitigation strategies and actions for each risk</li> <li>• Initial procurement strategy covering: <ul style="list-style-type: none"> <li>• Early subcontractor engagement</li> <li>• Strategic subcontractor arrangements</li> <li>• Strategic purchasing arrangements</li> <li>• Small Medium Enterprises (SMEs)</li> <li>• Apprentices</li> <li>• Training</li> <li>• Sustainable procurement</li> <li>• Efficiencies (cashable savings)</li> </ul> </li> <li>• Initial BIM model including client interface</li> </ul>

			regular basis	
C	Concept	Implementation of Design Brief. Preparation of concept design including outline proposals for structural and services systems with outline specifications. Preliminary Cost Plan. Review of procurement route	<ul style="list-style-type: none"> <li>• Attend design team and project meetings (Weekly) – see diagram 1</li> <li>• Attend and contribute to value engineering and risk management meeting/workshops</li> <li>• Identify and highlight project opportunities</li> <li>• Develop project execution plan (PEP) with project team including pre and post construction programmes</li> <li>• Review design solutions, providing advice on added value, buildability, carbon, EIA, BREEAM, waste and practical implications of proposals.</li> <li>• Set up workshops with key subcontractors to assist with design development/material selection</li> <li>• Prepare the preliminary cost plan.</li> <li>• Assist employer's professional team with the implementation of change control process and develop the tracking schedule</li> <li>• Prepare the cash flow forecast, whole life cost models and carbon calculation</li> <li>• Highlight risks and concerns on a regular basis</li> <li>• Review and develop initial procurement strategy</li> <li>• Identify any contractor design work</li> </ul>	<ul style="list-style-type: none"> <li>• Management structure (including pre-construction, mobilisation, during construction and post-constructions stages)</li> <li>• Management and project based preliminaries costs (including supporting calculations) and explanation of how costs relate to the Framework Agreement with inclusions/exclusions/assumptions identified.</li> <li>• Updated procurement strategy (covering items listed in previous stage)</li> <li>• Logistics Report</li> <li>• Complete EIA along with the site owner.</li> <li>• Project execution plan (PEP) (including overall project programme, design management and development, procurement and supply chain development, cost planning and package management, meeting structure, value and risk management, sustainability, additional services)</li> <li>• Cost Plan analysis and commentary report (including benchmarking of cost and design standards)</li> <li>• Pre-construction programme (critical path, key mile stones and lead times including identification of any materials/components requiring advance ordering and processing)</li> <li>• Proposals and fees for contractor design work to be undertaken during the pre-contract period</li> <li>• Issue monthly report highlighting progress,</li> </ul>

				achievements, critical issues and proposals
D	Design Development	Development of concept design. Updated outline specification and cost plan. Completion of project brief. Planning application. Completion of Employment Skills Plan (ESP)	<ul style="list-style-type: none"> <li>• Attend design team and project meetings (weekly – see diagram 1) including Gateway 2</li> <li>• Complete Cost Time Benefits proforma at Gateway 2</li> <li>• Attend and contribute to value engineering and risk management meeting/workshops</li> <li>• Identify and highlight project opportunities</li> <li>• Update project execution plan (PEP) with project team including pre and post construction programmes</li> <li>• Review design solutions providing advice on added value, buildability, carbon, EIA, BREEAM, waste and practical implications of proposals.</li> <li>• Set up workshops with key subcontractors to assist with design development/material selection</li> <li>• Prepare the elemental cost plan and submit to employer for review.</li> <li>• Develop package based cost plan in conjunction with employer's professional team.</li> <li>• Highlight risks and concerns on a regular basis</li> <li>• Market test mechanical and electrical package and any other relevant package</li> </ul>	<ul style="list-style-type: none"> <li>• Cost Time Benefits proforma</li> <li>• Updated Project execution plan (PEP) including items identified above</li> <li>• Buildability Report</li> <li>• Procurement strategy report</li> <li>• Procurement package schedule which should include: <ul style="list-style-type: none"> <li>○ Name of each works package</li> <li>○ Description of the scope of each package</li> <li>○ Design and pricing information required for each package</li> <li>○ Information release and tender dates</li> <li>○ Traditional or CDP</li> </ul> </li> <li>• Tender subcontract packages which have been identified and agreed with employer's professional team</li> <li>• Material/component system selection Report (i.e. M&amp;E and façade) including cost and procurement commentary</li> <li>• Pre-construction programme</li> <li>• Outline construction programme (critical path, key miles stones and lead times including identification of any materials/components)</li> <li>• Logistics Report including layout of site facilities and services</li> <li>• Drawing and information requirements and release schedule (procurement and construction)</li> </ul>

			<ul style="list-style-type: none"> <li>• Review and update procurement strategy</li> <li>• Discuss and agree with employer's professional team subcontract packages which should be appointed early and how they should be tendered i.e. mini competition.</li> <li>• Advise the employer's professional team on the breakdown of the project into suitable packages for sub-contracts. Develop package procurement schedule.</li> <li>• Discuss interfaces between packages to ensure no gaps.</li> <li>• Agree a list of proposed subcontractors with the employer's professional team</li> <li>• Prepare draft subcontractor enquiry documents including contract terms, agree attendances with project team</li> <li>• Develop outline construction programme</li> <li>• Develop project preliminaries</li> <li>• Assist employer's professional team with the implementation of change control process and update the tracking schedule</li> <li>• Prepare the cash flow forecast, whole life cost models and carbon calculation exercises</li> <li>• Completed ESP including detail of apprenticeship placements by work package.</li> </ul>	<ul style="list-style-type: none"> <li>• Updated risk register with report on key construction risks including management and mitigation plans</li> <li>• Updates of management and project based preliminaries costs (including supporting calculations) and explanation of how costs relate to the Framework Agreement with inclusions/exclusions/assumptions identified.</li> <li>• Written confirmation of acceptance of procurement package based cost plan</li> <li>• Issue monthly report highlighting progress, achievements, critical issues and proposals</li> <li>• Full design in BIM with a 3D simulation, including: <ul style="list-style-type: none"> <li>- Flow of people and evacuation simulation.</li> <li>- Acoustic simulation</li> <li>- Energy &amp; comfort and daylight simulation</li> <li>- Cost model</li> <li>- Project plan modelling</li> </ul> </li> </ul>
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E	Technical Design	Preparation of co-ordinated technical design and specifications	<ul style="list-style-type: none"> <li>• Attend design team and project meetings (weekly – see diagram 1)</li> <li>• Attend and contribute to value engineering and risk management meeting/workshops</li> <li>• Identify and highlight project opportunities</li> <li>• Update project execution plan (PEP) with project team including pre and post construction programmes</li> <li>• Review design solutions and provide advice including areas of waste reduction and BREEAM</li> <li>• Set up workshops with key subcontractors to assist with design development/material selection</li> <li>• Assist employer's professional team with the management of the package based cost plan including change control process and tracking schedule</li> <li>• Highlight risks and concerns on a regular basis</li> <li>• Update package based cost plan in conjunction with employer's professional team.</li> <li>• Update procurement strategy</li> <li>• Discuss and agree with employer's professional team subcontract packages which should be appointed</li> </ul>	<ul style="list-style-type: none"> <li>• Updated project execution plan (PEP)</li> <li>• Written confirmation of acceptance of procurement package based cost plan</li> <li>• Updated procurement strategy</li> <li>• Updated procurement package schedule which should include: <ul style="list-style-type: none"> <li>○ Name of each works package</li> <li>○ Description of the scope of each package</li> <li>○ Design and pricing information required for each package</li> <li>○ Information release and tender dates</li> </ul> </li> <li>• Tender subcontract packages which have been identified and agreed with employer's professional team</li> <li>• Updated outline construction programme (critical path, key miles stones and lead times including identification of any materials/components)</li> <li>• Updated logistics report including layout of site facilities and services</li> <li>• Updated drawing and information requirements and release schedule (procurement and construction)</li> <li>• Updated reports on key construction risks including management and mitigation plans</li> <li>• Updates of management and project based preliminaries costs (including supporting calculations) and explanation of how costs</li> </ul>

			<p>early and how they should be tendered i.e. mini competition.</p> <ul style="list-style-type: none"> <li>• Update procurement package list and discuss interfaces between packages to ensure no gaps.</li> <li>• Update procurement package schedule</li> <li>• Update outline construction programme</li> <li>• Update project preliminaries</li> <li>• Input into cash flow forecast, whole life cost models and carbon calculation exercises</li> </ul>	<p>relate to the Framework Agreement with inclusions/exclusions/assumptions identified.</p> <ul style="list-style-type: none"> <li>• Written confirmation of acceptance of procurement package based cost plan</li> <li>• Monthly report highlighting progress, achievements, critical issues and proposals</li> </ul>
F	Production Information	Preparation of production information to enable tenders to be obtained. Application for statutory approvals	<ul style="list-style-type: none"> <li>• As Stage E</li> </ul>	<ul style="list-style-type: none"> <li>• As Stage E</li> </ul>
G	Tender Documentation	Preparation and collation of tender documents in sufficient detail for tenders to be obtained	<ul style="list-style-type: none"> <li>• Finalise Employment Skills Plan (ESP)</li> <li>• Prequalification of 'new' subcontractors</li> <li>• Pre-tender briefings</li> <li>• Attend design team and project meetings</li> <li>• Attend and contribute to risk management meeting/workshops</li> <li>• Update project execution plan (PEP) with project team including pre and post construction programmes</li> <li>• Review design solutions and provide advice including waste reduction and BREEAM (including design solutions</li> </ul>	<ul style="list-style-type: none"> <li>• Include required apprenticeship placements, as per ESP, in appropriate subcontractor tender packages.</li> <li>• Prequalification of 'new' subcontractors</li> <li>• Conduct pre-tender briefing sessions</li> <li>• Updated project execution plan (PEP)</li> <li>• Regular updates of the package procurement schedule which should include: <ul style="list-style-type: none"> <li>○ Name of each works package</li> <li>○ Description of the scope of each package</li> <li>○ Design and pricing information required for each package</li> <li>○ Information release and tender dates</li> </ul> </li> </ul>

			<p>and site logistics are achieving points)</p> <ul style="list-style-type: none"> <li>• Set up workshops with key subcontractors to assist with design development/material selection</li> <li>• Comment on design against cost plan allowances</li> <li>• Assist with the management of the package based cost plan including change order process and tracker schedule</li> <li>• Highlight risks and concerns on a regular basis</li> <li>• Monitor interfaces between packages to ensure no gaps.</li> <li>• Update package procurement schedule</li> <li>• Agree preparation of work package tender documents in conjunction with the design team</li> <li>• Update outline construction programme</li> <li>• Update project preliminaries</li> <li>• Select supply chain tenderers in conjunction with the design team considering SMEs and apprentices</li> <li>• Prepare subcontractor enquiry documents including contract terms, agree attendances with project team</li> <li>• Assist employer's professional team with the preparation of pre-tender estimates based on tender documents</li> </ul>	<ul style="list-style-type: none"> <li>• Updates of the outline construction programme (critical path, key miles stones and lead times including identification of any materials/components)</li> <li>• Updated logistics report including layout of site facilities and services</li> <li>• Updated drawing and information requirements and release schedule (procurement and construction)</li> <li>• Updated reports on key construction risks including management and mitigation plans</li> <li>• Updates of management and project based preliminaries costs (including supporting calculations) and explanation of how costs relate to the Framework Agreement with inclusions/exclusions/assumptions identified.</li> <li>• Monthly report highlighting progress, achievements, critical issues and proposals</li> </ul>
H	Tender Action	Obtaining and appraising tenders. Submission of	<ul style="list-style-type: none"> <li>• Regularly update tender progress</li> </ul>	<ul style="list-style-type: none"> <li>• Regularly updated tender progress report,</li> </ul>

		<p>recommendations to client</p>	<p>report, procurement package schedule and cost tracking schedule</p> <ul style="list-style-type: none"> <li>• Prepare package tender reports in conjunction with project team</li> <li>• Prepare final project tender report</li> <li>• Discuss and agree construction stage drawings and information requirements</li> <li>• Agree construction programme with early order requirements</li> <li>• Agree schedule of orders</li> <li>• Prepare a co-ordinate programme of CDP elements</li> <li>• Prepare and agree with the project team a construction risk register</li> <li>• Agree a schedule of orders required prior to contract award for contractor design /CDP packages identifying order value and date required</li> <li>• Agree and finalise project preliminaries</li> <li>• Attend design team and project meetings including Gateway 3</li> <li>• Review BREEAM requirements (including design solutions and site logistics to ensure points are achieved)</li> <li>• Complete Cost Time Benefits proforma at Gateway 3</li> </ul>	<p>procurement package schedule and cost tracking schedule</p> <ul style="list-style-type: none"> <li>• Updated package tender reports</li> <li>• Final project tender report</li> <li>• Schedule of construction stage drawings and information requirements</li> <li>• Construction programme with early order requirements</li> <li>• Schedule of orders</li> <li>• Programme of CDP elements</li> <li>• Construction risk register</li> <li>• Schedule of orders required prior to contract award for contractor design /CDP packages identifying order value and date required</li> <li>• Updated Management and project based preliminaries costs (including supporting calculations) and explanation of how costs relate to the Framework Agreement with inclusions/exclusions/assumptions</li> <li>• Cost Time Benefits Proforma</li> </ul>
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## **Design and Build**

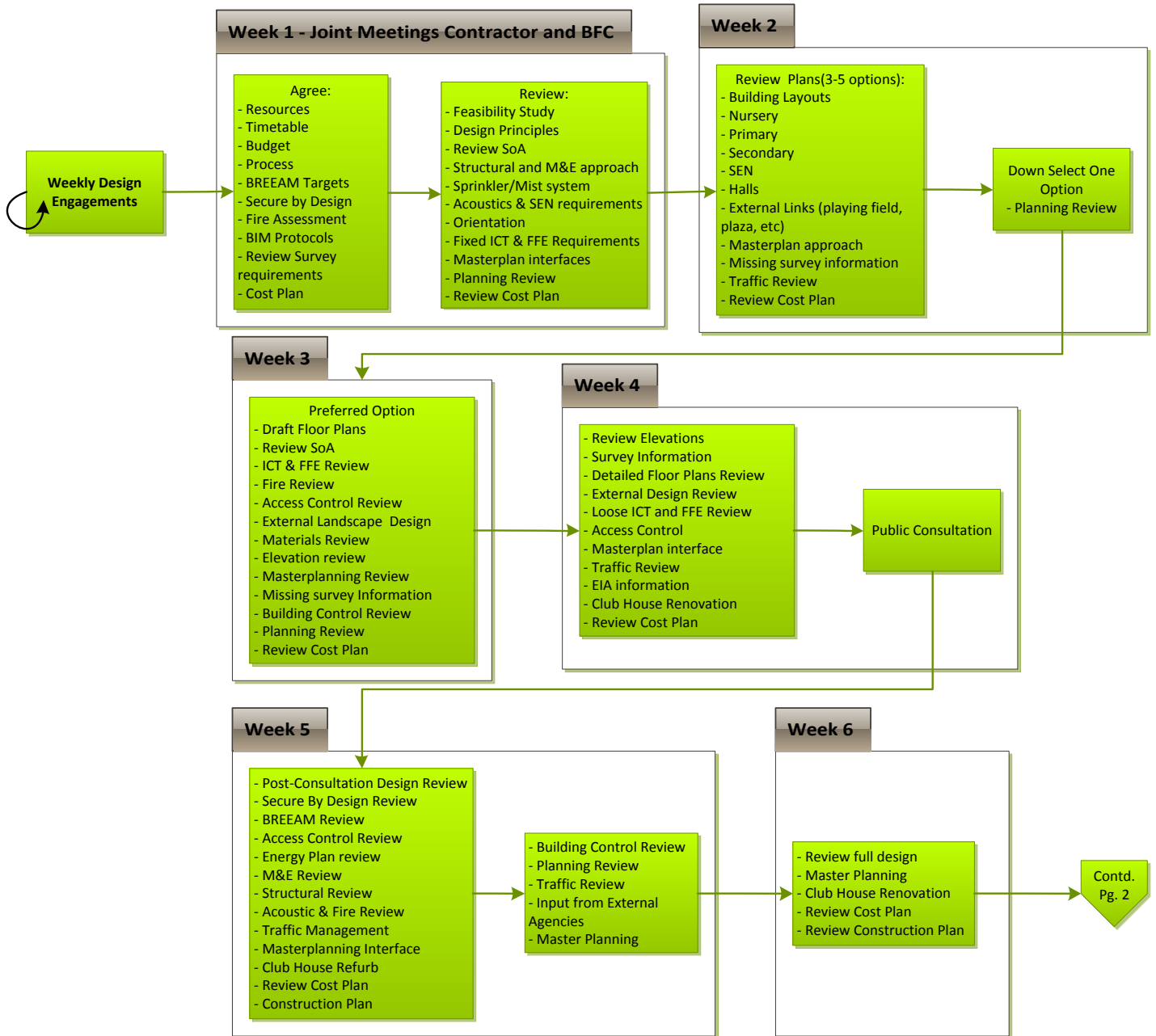
Main contractors are required to provide the following services/ in addition to those activities/outputs identified above for Construct procurement route:

- 1 Develop and complete the design from appointment (stage 1/B) to stage H including preparing contractors proposals to be incorporated into the contract documents. The contractor is required to co-ordinate the design team and manage/facilitate design team meetings in line with the example listed in Diagram 1.
- 2 Undertake the final design in accordance with the client's brief and outline proposals. Check the client's team have provided all necessary survey information including incoming, existing services, geotechnical reports, asbestos and advise / agree on further surveys if necessary. Submit all necessary approval applications. Produce a fully detailed NBS specification together with supporting 1:50 scale general arrangement drawings, elevation and sections, 1:50 engineering drawings. Providing all necessary 1:5 working details, and schematic diagrams and supporting calculations for services, and structural calculations. Allow for the following disciplines:
  - Architecture
  - Structural engineer design
  - Mechanical engineer design
  - Electrical engineer design
  - Acoustic engineer design
  - Drainage design
  - Hard and soft landscaping architecture
  - Quantity surveying
  - BREEAM Assessor
  - Fire Assessment
  - Transport design
  - ICT & FFE (fixed and loose) design
  - Any other discipline required for delivery of the project
- 3 Specific requirements:
  - The completed design shall comply with current design standards
  - Obtaining Building Regulations Approval
  - Obtaining Full Planning Approval and associated activities
  - Conducting Fire Risk Assessments
  - Obtaining BREEAM rating
  - Comply with all other current and upcoming standards and statutory requirements
- 4 These requirements must be read in conjunction with the **Project Specific Brief (attached)**.
- 5 The EFA's Facilities Output Specification and Area Schedules (attached) forms part of the requirements for the pre-construction services required by the contractor.

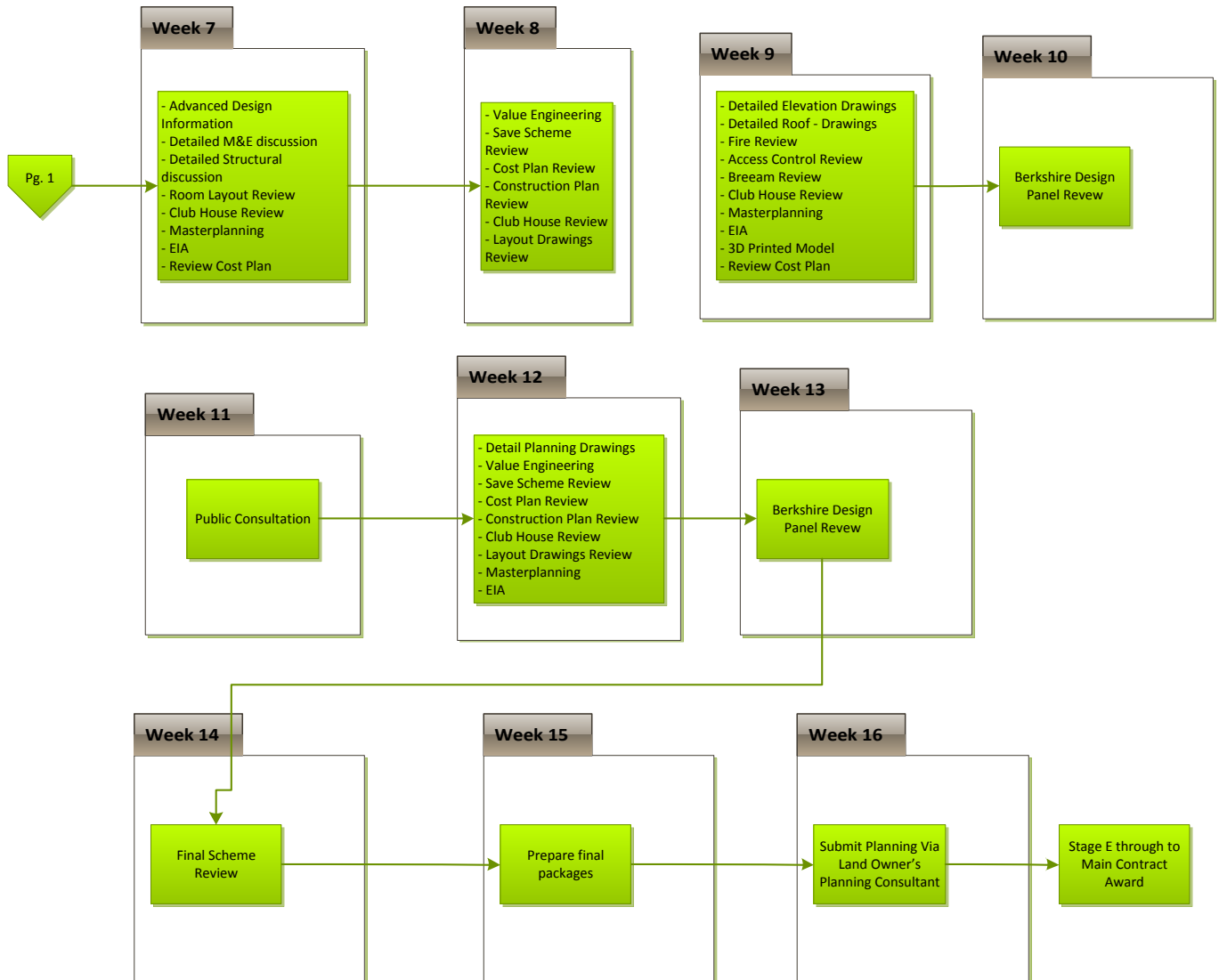
- 6 Diagram 1 – A generic process example of the pre-construction design stage is attached. The Council will require weekly full day design meetings (preferably on the same day each week – most likely, Thursday, 10am to 4PM at client office) in partnership with the contractor. The design period is envisaged to be fast-paced where the design can be progressed with full involvement of the Council team. A collaborative process will ensure that decision making is streamlined and all attendees positively contribute to the weekly sessions. The contractor's design team will provide the activities and agenda for the weekly meetings, which will be chaired by BFC. An estimation of resource utilisation through various stages of the design meetings is required e.g. 100% involvement of the lead architect from week 1 to week 15. The generic process map is an example of how the weekly full day sessions could be arranged. The contractor should set out in their tender to this mini-competition how they would like to operate the weekly sessions ensuring that all the various disciplines are included in the meetings at the relevant stages and the key milestones as per the programme plan (Appendix 2) would be met.
- 7 Due to the tenancy terms between the existing land owner and their tenant, site access will not be available during the mini-competition. Access to site will only be available from 27 April 2015 onwards. In order to maintain timetable, the council and the land owner may pre-plan commissioning surveys on and after 27 April 2015. This needs to be carefully timetabled to allow design progression to take place in parallel, where possible. LIDAR survey is attached, which will provide the topography information.
- 8 The ICT and FFE (fixed and loose) matrix is attached, which describes the responsibility for the contractor. The contractor's design team must include specialists during the weekly design meetings as and when required.
- 9 The Council's equal opportunities policy is attached. The contractor must ensure that it adheres to the principles in delivering services to the Council.

**Diagram 1 – generic process example of the pre-construction design process.**

**Pre-Construction Stage - Page 1**



Pre-Construction Stage - Page 2



**Appendix 10 Pre Construction Agreement**

**Appendix 11 JCT DB 2011 - Special terms and Conditions for Underlying Contract**

**Appendix 12 Enabling Works Contract**

## Appendix 13 Freedom of Information Act Certificate

TO: **BRACKNELL FOREST BOROUGH COUNCIL**

We have read and understand Instruction to Tenderers and acknowledge that the Authority has obligations in relation to Freedom of Information.

In accordance with the provisions of sections 41 and 43 of the Freedom of Information Act and the Environmental Information Regulations 2004 (The Acts) we wish/do not wish to request an exemption for certain information provided to the Authority in preparation and completion of our tender for the Services with the Authority.

If we are awarded this Agreement we ask that the information in table 1 be put in a commercially sensitive schedule to the Agreement.

Table1: confidential and commercially sensitive information

<b>Information</b>	<b>Justification for Exemption</b>	<b>Minimum Period of Exemption</b>

Signed

For and on behalf of

Date

**Appendix 14 – Parent Company Guarantee Undertaking**

**Appendix 15 – Bond Undertaking**

**Appendix 16 – Conditions of Tendering**

**Appendix 17 – Deed of Appointment for Surveys**