

APPENDIX A

Tender Evaluation Report

Provision of a 14 class 'model' primary school in Somerton,
Somerset
Ref: DN354694

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Management Summary

Somerset County Council have a statutory duty to provide suitable class room provision to pupils within Somerset.

Following extensive analysis by the Schools Commissioning Team a new 14 class primary school is required in Somerton by Sept 2020.

The council asked for proposals based on pre-designed 'Model' primary school which approach was agreed through the Infrastructure Board as analysis carried out by Procurement and Property indicated that a 'model' school approach could deliver savings.

Following a Key Decision approval dated 27/02/18; the decision was taken to go out to tender following a competitive process under the Southern Construction Framework. Following the evaluation of the responses by stakeholders (listed in Appendix 2), this evaluation report proposes the award of the contract to the winning contractor.

Key Summary Points

1. Term

The contract term will be for pre-construction and construction of the school by Sept 2020.

2. Scope

The pre-designed school must be a fully serviced and functional model; in simple terms: finished floor, walls, roof, internal finishes, fixed furniture and signage. Externally, all fencing, gates, paths, external lighting, hard play areas and court markings, playing fields and pitches, planting and landscaping, access roads and external signage as required to deliver a fully operational school on completion. All civil and structural works reasonably required shall be deemed to be included within the model school cost.

The school must have a streamlined and efficient design, that utilises appropriate design and construction processes to save time and provide real value for money that can be easily demonstrated and proven through past performance.

The school will be a two-storey school with ground floor classrooms having direct access to external teaching and play areas.

The form and materials palette proposed for the school should be both sympathetic to the surroundings, whilst providing a contemporary building which will give both an educational focus and community hub for the area.

The design for the school must demonstrate that it has been undertaken with an educational focus. The priority for the design needs to provide an optimised learning environment, with best possible daylight and natural ventilation, clear way finding and rational organisation and to give pupils of the school the best possible outcomes.

3. Procurement Process

a) Approach to Market

This is the first procurement exercise that has had full procurement support available to Property. The support has encouraged a different approach and thinking to the procurement exercise. Procurement have worked closely with Property and Schools Commissioning to agree the approach, including having commissioners as part of the evaluation team, clear minimum criteria and weighting discussions

A number of commissioning models and routes to market were discussed including the SCAPE framework which is a direct award arrangement, carrying out our own OJEU exercise, using the Futures 4 Somerset framework or carrying out a competition under the Southern Construction framework.

The Infrastructure Board agreed that a carrying out a competition would be required to establish whether the 'model' school approach was viable, what type of models were on offer and what commercial offer. This could only be achieved by carrying out our own OJEU exercise or under the Southern Construction Framework further competition route. In order to reduce the requirements on internal resources the Southern Construction Framework was agreed as the preferred route to market, because it meets OJEU requirements, has agreed rates, KPI's and all the available suppliers have a history of delivering school build projects.

Southern Construction Framework

The framework has a pre-determined two stage process. Stage 1 seeks expressions of interest from all 10 of the suppliers on the framework and high-level confirmation that they have the ability to carry out the works.

On this occasion 5 suppliers submitted expressions of interest and were invited to stage 2 – tender process.

b) Market/stakeholder engagement

As there are a number of new school builds in the proposed pipeline we have engaged with all the framework suppliers to advise on the proposed pipeline and understand what encourages them to bid to ensure we have the best chance of receiving good value, good quality responses.

We have also been in discussions with the Southern Construction Framework 'owners' Devon County Council to understand how best to use the framework and

learn from other organisations that use the framework. This has enabled us to build a good relationship with the suppliers and Devon County Council.

c) Evaluation Methodology

Tenders were evaluated in accordance with the evaluation criteria set out the procurement documents, which was agreed between Commissioning, Property and Procurement as follows:

Sub-Criteria	Percentage of Overall Weighting (%)
Part D	
Technical Question 1	5%
Technical Question 2	2%
Technical Question 3	30%
Technical Question 4	5%
Technical Question 5	3%
Technical Question 6	2%
Technical Question 7	3%
Total	50%

Tenders were evaluated on the basis of 50% quality and 50% price. The framework stipulates that 50% is the maximum price weighting allowed.

The scoring mechanism is contained in Appendix 3.

Each evaluation panel member (see Appendix 2) scored each tender submitted on an individual basis and prior to the moderation meeting held on the 13th September 2018.

Financial Evaluation

The following formula was used to evaluate price as submitted by Bidders:

$$\text{Score} = \frac{\text{Lowest Price received by SCC across all Tenders} \times 50}{\text{Your organisation's price submitted}}$$

This process essentially ranks the lowest to highest prices and allocates a score based on the difference between them.

This evaluation process has been overseen by the Commercial and Procurement Team.

d) Invitation to provide a Tender

5 potential providers expressed an interest in receiving an Invitation to Tender (ITT) through the e-Tendering System (ProContract). The Procurement Documents were issued on 24th July 2018.

Bid responses were received by the closing date of 12 noon on 24th August 2018, as follows:

- 5 Bidders responded
- All Bidders submitted a compliant Bid
- Bids were evaluated in accordance to the criteria set out in the Procurement Documents, which are available upon request.

The Bids were evaluated and moderated by a panel of SCC and School staff (see Appendix 1).

Overall scores for the Bids (see Appendix 2). The name of the winning contractor and their tendered price is contained separately within confidential Appendix B.

5. Sourcing Recommendation

It is recommended to award a Contract to the winning contractor on the basis that they provided the Most Economically Advantageous Tender.

The Commercial and Procurement Team has checked all submitted tenders to ensure that all required documents were received.

Any risks identified can be incorporated in the discussions with the successful Bidder as part of the contract award process.

If SCC discovers errors or omissions in the Bid post award, the Bidder may be required to justify the price/item(s) concerned. SCC reserves the right not to accept any amendments to the initial Bid. If suitable justification is not supplied in relation to any errors or omissions, SCC reserves the right to approach the Bidder with the second highest score in order to award the Contract.

6. Contractual Position

The new Contract will be established between the winning contractor and SCC. The Contract will be under the NEC3 terms and conditions.

This is subject to approval of a Key Decision supported by this evaluation report.

7. Termination

There is a break clause within the Contract which allows termination at pre-construction stage, there is no commitment to continue to construction.

8. Programme

A detailed programme plan is submitted as part of the tender exercise and indicates delivery by Sept 2020. The major projects team in Property work with the provider to ensure the programme is kept up to date and delivered as agreed.

10. Risks

The main risks at this stage are to programme and costs. Mitigations have been suggested by the provider to ensure delivery on time and on budget. Surveys on the land have taken place and no additional risks have been discovered at this stage. Specific risks are addressed during the pre-construction phase, mitigation and ownership are also agreed during this phase.

11. Service Levels and Contract Management

Customer satisfaction and service levels will be monitored as part of Contract Management. The major projects team in Property will contract manage the agreement to ensure that the service meets expectations and to identify further opportunities for cost and service improvement.

12. Added Value

A key element of the Southern Construction Framework is to ensure social value is 'wrapped up' within the contractor's tender submissions. In particular apprenticeships and training opportunities.

The provider has also indicated that they will work with the local community and school to arrange interactive site visits during the build, offer mental health workshops to break down stereotypes and demonstrate coping techniques. Specific opportunities will be discussed during the pre-construction phase.

13. Next Steps

- a) Key Decision to be signed off
- b) Suppliers to be informed of the decision by Commercial and Procurement Team
- c) The Contract is to be sealed once the standstill period is complete.

End of Report

Appendix 1

Evaluators

The quality evaluation team:

- John Houlihan Major Projects Strategic Manager, SCC
- Richard Morris Project Management Team Lead, SCC
- Liz Smith Service Manager - Schools Commissioning, SCC
- Suzie Svenson Headteacher, King Ina Academy

The Commercial/Financial Requirements evaluators: -

- Heather Neale Senior Quantity Surveyor, SCC
- Natanya Nathan Service Manager - Procurement, SCC

Appendix 2 – Breakdown of final Scores

	Weighting	Supplier A	Supplier B	Supplier C	Supplier D	Supplier E
Quality	50%	46.00%	46.00%	46.40%	46.40%	48.00%
Price	50%	50.00%	40.71%	44.58%	41.59%	45.92%
Total	100%	96.00%	86.71%	90.98%	87.99%	93.92%

Appendix 3 – Scoring Methodologies:

Mini Competition Question	Unacceptable (0)	Poor (1)	Good (3)	Excellent (5)
Examples of Scoring Criteria				
Q1. Financial Control : (Mandatory Question)	Answer not supplied	Poor explanation of how the project will be delivered to the cost and of risks and mitigation	Good explanation or demonstration but with minor weaknesses	Excellent explanation or demonstration with significant added value
Q2. BIM :	Answer not supplied	Poor explanation of how the contractor will ensure the required level of BIM is achieved and failure to detail derogations required	Good explanation or demonstration but with minor weaknesses	Excellent explanation or demonstration with significant added value
Q3. Quality Assurance & Performance :	<p>Score out of 5 will be calculated on a pro-rata basis. The contractor will need to complete the ‘accommodation schedule assessment’ provided within Appendix J to confirm the number of critical and non-critical rooms included for within their proposed adapted model school, and the smallest size of each room type.</p> <p>If you fail to deliver the required number of rooms or the minimum room size for any of the critical areas, you will score 0 and your Tender will be disqualified. If you deliver the minimum requirement in terms of number and size, you will score 3 points for each room and awarded a total of 87 points.</p> <p>If you fail to deliver the required number of rooms for any of the non-critical areas, you will score 0 and your Tender will be disqualified. Delivery of the required number of non-critical areas to the minimum room size stated will score 3 points for each room. Delivery of the required number of non-critical areas, below the minimum room size but still with a functional area, will score 1 point for each room. You can score a maximum of 24 points on the non-critical areas.</p> <p>The percentage of marks gained out of the 111 available will be applied to the 5 marks available to determine the marks obtained. E.g. 99 (minimum score to stay in competition) / 111 = 89.19% => 4.46 Marks Scored</p> <p>Example scoring is included in Appendix J on the tab titled “Example Scoring”.</p>			

<p>Q4. Quality Assurance & Performance :</p> <p>Note: Failure to score 5 marks will result in instant disqualification.</p>	<p>Failure to comply in full with the requirements of the 'essential adjacencies map'.</p>	<p>N/A</p>		<p>Full compliance with the requirements of the 'essential adjacencies map'.</p>
<p>Q5. Social Responsibility : (Mandatory Question)</p>	<p>Failure to provide ESP or Method Statement.</p>	<p>ESP and Method Statement provided. ESP requirements not met and no reason given for variations</p>	<p>ESP and Method Statement provided. ESP requirements not met and valid reason given for variations</p>	<p>ESP and Method Statement provided and minimum requirements met</p>
<p>Q6. Social Responsibility :</p>	<p>Answer not supplied</p>	<p>Poor explanation of how the contractor will provide deliverables and additional benefits</p>	<p>Good explanation or demonstration but with minor weaknesses</p>	<p>Excellent explanation or demonstration with significant added value</p>
<p>Q7. Programmes of Work :</p>	<p>Answer not supplied</p>	<p>Poor explanation of how the project will be delivered to programme and of risks and mitigation</p>	<p>Good explanation or demonstration but with minor weaknesses</p>	<p>Excellent explanation or demonstration with significant added value</p>