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**Invitation to tender for the provision of:**

**Carbon reduction works at Brockhole Lodge Office**

**21st October 2022**

# INFORMATION AND INSTRUCTIONS TO TENDERERS

### Introduction and background to the project

You are invited to submit a tender for carbon reduction measures at the Lodge Office (Thirlmere building) at our National Park Visitor Centre at Brockhole.

Brockhole is the Lake District National Park Authority Visitor Centre, located between Windermere and Ambleside. It consists of a formal house and gardens and also has a lodge complex, one element of which is used as an office by LDNPA staff. As part of our net zero programme we wish to undertake works to maximise energy efficiency, minimise energy consumption and also refurbish the toilets of this building.

The building is single storey of approximately 130m2 footprint with a pitched slate roof, and of solid rubble wall construction with render facing. The internal space is divided into a main office, a lobby/corridor and male/female/disabled toilets.

Heating of the majority of the building is currently via an oil boiler and radiators. Hot water is via a single central calorifier.

The date of the contract is from 2nd January to 31st March 2023.

### Tender objective

Towards the objective of minimising the carbon footprint of this site by maximising energy efficiency and minimising energy consumption, and also improving the toilets, we invite contractors to submit tenders for the following components:

1. Installation of an air source heat pump to replace the heating currently provided by the oil boiler, upgrade to DHW heaters and extractor fans;
2. Installation of internal insulation to external walls;
3. Replacement of doors and windows with double-glazed / better-insulated equivalents (like-for-like);
4. Refurbishment of toilets;
5. Upgrade of lighting to LED.

You may tender for all of the above or any combination of components 1-5.

The contractor will be expected to submit a fixed fee proposal for the design and installation of the relevant component(s) and have the capacity to deliver the contract **between 2nd January and 31st March 2023.**

Planning approval may be required for component 1; this process is underway.

The LDNPA has a limited budget and is looking for a completive bid which can demonstrate good value for money, while providing quality work which minimises environmental impact and maximises carbon savings. A weighted evaluation will be made on tender returns will be based 50% on cost and 50% on quality of the proposed solution (as detailed in this document).

### Invitation to tender and documents provided

The following documentation has been included:

Annex 1 - Form of Tender **(to be returned completed)**

Annex 2 - Declaration of Non-Collusion **(to be returned completed)**

Annex 3 - References Proforma **(to be returned completed)**

Annex 4 - Location Plan

### Submission of the tender documents

**What you need to do**

Please limit your submission to no more than 10 pages and detail your costs on a separate sheet.

Your submission should include:

* Completed form of tender, including breakdown of costs
* A firm price for completion of all the work (i.e. a price that is not subject to variation).
* Relevant experience.
* References – these should demonstrate similar projects on similar sites (Annex 5)
* Declaration of non-collusion (Annex 4).
* Proposed technical tender response including details of:
	+ Materials and designs, including M&E;
	+ How carbon savings can be achieved for example by (but not limited to), insulation, heating, heat recovery from ventilation etc. as appropriate;
	+ Proposed logistics for set up, accessing, and safe working on site;
	+ Proposed logistics for minimising disruption to the office;
	+ A priced schedule/programme of works detailing what will be completed, when it will be completed and its associated cost;
	+ HSE considerations and risk assessments relevant to the works;
	+ Brief CVs of the key personnel who will be undertaking the work (for example contracts manager and or site supervisor/project manager);
	+ A schedule of day rates for both design work and construction work for any mutually agreed variations to the contract in addition to the agreed fixed price;
	+ Details of warranties and guarantees;
	+ Details of your accounts and evidence in relation to financial viability of your business.

Your submission should be a fixed price (excluding VAT) and a complete cost including any prelims etc. We also expect to see a priced scheduled of works and Provisional Costs elements in your costing should be avoided, but if absolutely necessary, included with an explanation and a likely cost range.

Any assumptions made in your submission should be stated, along with what reasonable measures you have taken to test that the assumptions are correct.

It will the contractor’s responsibility to ensure a good design. Please give proposed construction methods/details in your tender response.

The appointed contractor will be responsible for the appointment, overseeing, HSE, quality of work etc. of any sub-contractors that they use and the details of any sub-contractors to be used should be included within your tender return.

It is recommended that contractors visit the site. Because it is a working building this must only be done by arrangement. We are holding a site open day on 10th November. If it is not possible to make use of the open day, please request an alternative date via the messaging service on the procurement portal. Please do not visit the site without arrangement.

The appointed contractor will be responsible for its staff and sub-contractors’ safety and welfare. There are toilets at the office; these will be out of commission during refurbishment works, but there are other public toilets around the site. There is no dedicated parking at the site but limited public parking nearby and the area is open to the public.

As the site will be in a public area, please include in your tender details of how you will keep the site safe/secure and details of how you will manage deliveries etc. Access to the works site is through a public car park, so please allow for all moving vehicles outside of any site compound to be supervised by a suitable banksman.

The works will be agreed and managed using as standard 2016 JCT Minor Works contract. The LDNPA will be provide a client-side project manager who will be available to liaise with the contractor’s site supervisor/project manager to review progress etc.. The client’s project manager will be contactable, but not on site every day. The appointed contractor’s site supervisor/project manager will be expected to be responsible for day-to-day works and to liaise with the on-site operational management teams to avoid any disruption to the operations at the Information Centre.

The exact terms of the contract will be subject to a separate agreement and will include an agreed payment schedule based on your tendered costed programme of works and any penalties, for example for late completion. This site is a busy office, and therefore it is imperative that business interruption is kept to an absolute minimum. Our strong preference is that works are completed within a 2nd January – 10th February 2023 timeframe. The site will then be very busy over the half term period and while work may be able to be progressed additional care will need to be taken not to interfere with the operational running of the site. If necessary, works can continue from 20th February – 31st March 2023. **You must indicate on your tender response your** **ability to complete the works by the 31st of March 2023 (statement contained within the Form of Tender Annex 1).**

The works will be subject to UK Building Regulations and the LDNPA will make the application to South Lakes District Council (SLDC) for the works and inspections etc. However, the appointed contractor will be expected to work with SLDC to ensure compliance to regulations and timely completion of certificates etc.

**Tenders must be received by 12 noon on 18th November 2022**. Tender documents received late, i.e. after the specified date and time, will not be considered.

Before commencing a formal tender evaluation, documents provided by tenderers will be checked to ensure that they are complete. At this stage, any non-compliant tenders will be rejected by the Authority.

Tender responses which are deemed to meet the eligibility requirements will be shortlisted and we may invite tenderers for a second stage interview. Shortlisted tender submissions will be evaluated according to the Evaluation Criteria given later in this document.

**Questions on tender submissions**

### If contractors have any questions they wish to ask the Authority before they submit a tender they must submit them via The Chest procurement portal’s messaging service. Any contractors contacting the Authority directly, will be directed to use The Chest portal’s messaging service.

### Any questions received via the portal’s messaging service may be made anonymous and responses sent to all tenderers if appropriate.

**How to return your tender**

The tender is to be submitted in electronic format via The North West Procurement Portal - The Chest procurement portal.

All correspondence, including final submitted tender documents must be received via The Chest by **12:00 (noon) 18th November 2022.**

### Please ensure you allow enough time to complete uploads to the system before the deadline.

### Tender documents received late, i.e. after the specified date and time, will not be considered.

### Please raise all queries related directly to this tender via The Chest portal messaging system. However, all questions relating to the use of the portal, or any technical problems arising from its use should be directed to The North West Procurement Portal support team. The Authority will not be able to help you directly with any usability or technical issues.

[The Chest: North West Procurement Portal (the-chest.org.uk)](https://www.the-chest.org.uk/SupplierSupport.html)

**Opening of tenders**

### Tender documents will remain unopened until after the closing date, after which time they will all be passed to the originating department for checking. All tenders submitted will be verified to ensure that the information requested has been provided before they are evaluated.

**Checklist for tender compliance**

The following completed documents are required for the tender to be deemed compliant:

* Form of Tender (Annex 1)
* Declaration of Non-Collusion (Annex 2)
* References (Annex 3)
* A clear commitment to complete the works by the 31st March 2023 (in Annex 1).
* A fixed fee proposal including a breakdown of contractor prelims (in Annex 1).
* A costed schedule/programme of works.

### Evaluation of tenders

### Once verified as complete, the tenders will be considered based on the information they have submitted in their response. The tenders will be evaluated upon the following criteria:

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| --- | --- |
| **Evaluation criteria** | **Potential score** |
| Price* Fixed fee proposal including a breakdown of contractor prelims and a priced schedule of works.
 | 50 |
| Quality of proposal / experience* Proposals to minimise environmental impact and maximising carbon savings.
* Quality of the proposed works, including costed programme/schedule of works.
* Appreciation of site-specific issues and ability to demonstrate effective delivery whilst maintaining public safety and ability to demonstrate minimal disruption to site operations.
* Evidence of prior experience delivering similar services on a comparable site and the quality of CVs submitted.
* Your ability to take on multiple components of this tender
 | 50 |
| **Maximum possible score** | **100** |

**Award of tender**

### The Authority will decide to whom the contract shall be awarded based on the evaluation criteria outline above. The Authority does not bind itself to accept the lowest or any tender/quotation and reserves the right to accept the whole or parts of tenders/quotations.

### The Authority will notify acceptance of the tender to the successful tenderer as soon as is reasonably practicable. Contract will be awarded following a 10 day ‘cooling off’ period after the notification to the successful contractor.

**Post-evaluation contact and information**

For feedback on your submission after it has been evaluated and the contractor notified of the outcome, please contact Martin Sleath; Martin.Sleath@lakedistrict.gov.uk Sustainability Adviser, Lake District National Park Authority, Murley Moss Business Park, Oxenholme Road, Kendal, Cumbria. LA9 7RL

**The timetable for this tender:**

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| --- | --- |
| **Date** | **Activity** |
| 21st October 2022 | Publication of Tender Documentation |
| 10th November 2022 | On site accompanied visits by appointment requested using The Chest portal messaging system. Note: the site is open 7 days a week to the public but contractors should not visit the Lodge area except by arrangement. |
| 12:00 noon 18th November 2022  | Tenders return deadline |
| Week commencing 21st November 2022 | Tender evaluation and shortlisting |
| Week commencing 28th November 2022  | Notifications to successful and unsuccessful contractors |
| 12th December 2022  | Contract Award to successful contractor (after 10 working day cooling off period) |
| To be agreed but anticipated early January 2023 | Commencement of works |
| 31st March 2023 | Works to be completed |

### ADDITIONAL TENDER INFORMATION

**Confidentiality**

### The details of these documents and all associated documents are to be treated as private and confidential for use only in connection with the Tender process.

**Freedom of Information**

### The Authority is committed to meeting its legal responsibilities under the Freedom of Information Act 2000 and the UK GDPR and the DPA 2018 Acts. Accordingly all information submitted to the Authority may need to be disclosed in response to a request under the Act. If you consider that any of the information included in your tender is commercially sensitive, please identify it and explain (in broad terms) what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity. You should be aware that, even where you have indicated that information is commercially sensitive, we may be required to disclose it under the Act if a request is received. Please also note that the receipt of any material marked ‘confidential’ or equivalent by the public authority should not be taken to mean that the public authority accepts any duty of confidence by virtue of that marking. If a request is received, we may also be required to disclose details of unsuccessful tenders.

**Anti-fraud and Corruption Policy**

### The Authority has an Anti-Fraud and Corruption Strategy which sets out the responsibilities of officers and action to be taken in cases of theft, corruption, irregularity, or when damage is suspected. The Confidential Reporting Code, (Whistle Blowing Policy), forms part of this Strategy which provides a mechanism for staff to report suspected wrong doings confidentially. In the event of such an issue, an investigation would be carried out and action taken as necessary.

**Costs and expenses**

### The Authority will not be responsible for, or pay for, expenses or losses which may be incurred by a tenderer in the preparation of their tender. The Authority does not bind itself to accept any of the tenders as a result of the tendering process including the lowest tender.

**Preparation of tenders**

### For the preparation of their tender and entering into a contract with the Authority, tenderers must ensure that they have all the information required and must satisfy them of the correct interpretation of terminology used in these documents.

**Queries on the tenders**

If any points in these tender documents are considered by the tenderer as unclear, the tenderer should use The Chest messaging portal to address their queries and obtain an explanation before sending their tender. Their query will be responded to, but it shall not be construed in a way that adds to, modifies or takes away from the meaning and intent of the contract and/or the obligations and liabilities of the contract.

**Alterations**

### None of these documents may be altered by the tenderer. If the tenderer wishes to propose modifications to any of the documents (which they may consider would provide a better way to achieve the contracts objectives) they must provide details in a separate letter accompanying the tender response.

**Prices**

All prices must be net and, where applicable, carriage paid with all cash and trade discounts allowed for.

**VAT**

All prices and/or rates shall be **exclusive** of VAT.

**Validity of tenders**

### Tenders shall be valid for a minimum of three calendar months from the closing date for receipt of tenders.

**Sub-contractors**

### The names and addresses of any sub-contractors the tenderer proposes to employ must be provided with the tender.

**Quality of goods / services**

### Tenderers must possess relevant professional qualifications and experience.

**Conflict of interest**

### The Authority requires all tenderers to confirm whether any actual or potential conflicts of interest that exist which may prevent them undertaking this work, and a description of measures they would adopt if a potential conflict of interest arose during or following completion of this work.

**Treatment of tender**

### The acknowledgement of receipt of any submitted tender shall not constitute any actual or implied agreement between the Authority and the tenderer.

**Debriefing**

### All unsuccessful bidders will be offered the opportunity to be given a debriefing. Requests for debriefing are to be made in writing.

**The Authority’s use of Contract Outputs**

### The Authority may wish to publicly quote the Contract Outputs such as any policies, figures, training materials, risk assessments etc. Tenders are requested to confirm that the Authority may (at the Authority’s own discretion) do so without restriction.

**Ownership**

### The intellectual property rights rests with the Authority, not the tenderer.