**Contract Ref: THIR 23 930**

**Contract Title: Mechanical and Electrical**

**Consultant Design Services**

**The Project Brief**

**THIRTEEN HOUSING GROUP**

**2 Hudson Quay**

**Windward Way**

**Middlesbrough**

**TS2 1QG**

**The Brief**

## Scope

* 1. Thirteen are seeking to appoint a suitable consultancy practice to support the design team and group wide departments in ensuring that the group meet legal and regulatory compliance objectives, whilst carrying out investment and compliance works, the consultancy practice will be responsible for designing electrical, mechanical installations associated with building services as instructed by the group’s representatives. The geographical areas that the consultant practice will be expected to cover are the Tees Vally, Middlesbrough, Stockton, Darlington, Hartlepool, and outlying areas e.g. Newcastle. Gateshead, Sunderland, Durham, York, and Hull
  2. The design work engagement will be initiated by a design brief originated by thirteen representatives. Upon agreeing the brief and work scope the consultant shall visit the site to measure and carry out a site survey to provide the group with a fee proposal in line with the schedule of rates tendered in bid.
  3. The fee shall be spilt in to two parts, Stage one to produce design information and documentation up to tender stage, inclusive of tender analysis and marking, stage two for onsite support during construction phase, clerk of works duties as instructed and final commissioning.
  4. The consultancy practice will predominantly work alongside the design team in the Asset Management department, however other departments may require design services and the same terms and conditions of engagement will apply when working directly for other departments.
  5. Electrical: The practice will carry out a wide range of design work in the electrical engineering field, most of the design work will be carried out for planned investment and compliance within the group’s complex buildings.

The scope of work will be determined by the asset management and design team based on information from surveys.

The electrical work scope comprises of general electrical installation ranging from small power and lighting, fire alarm systems, emergency lighting, integration of smoke ventilation and sprinkler systems. Design essential distribution systems and generator integration.

* 1. Mechanical: The practice shall carry out mechanical design work for all the groups complex buildings, the scope will involve designing new heating system, replacement of existing heating system, mechanical ventilation system, air conditioning, smoke ventilations systems. Replacement of water booster and associated equipment.

The consultant will support and advise thirteen on a range of suitable renewable technologies. They will carry out building surveys to determine building specific requirements and renewable technology suitability.

* 1. M&E Surveys: The practice will be required to carry out a range of detailed electrical, mechanical surveys as instructed by the asset management team, once the surveys have been carried out a detailed report will be required detailing timelines of life expectancy and budgetary figures for asset planning and future investment works. The surveys will be carried out in a wide range of thirteen stock.
  2. Survey Information: The condition survey report shall be in the form of a photographic and written report on equipment and services. The report shall give an indication of remaining life expectancy and any imminent concerns regarding equipment failure. Recommendations shall be included in a separate section within the report. A matrix data sheet shall be included, which will inform thirteen asset management of building requirements.

## Background to the Requirement

* 1. Thirteen typically invest circa £30m each year in delivering our capital investment program across our housing portfolio, this will change year on year in line with our Asset Plan. Whilst this planned investment has provided safe, warm, and modern homes for our customers we are always looking to ensure we are maximising the value for money we can drive through our investment.

To meet the delivery targets design work is carried out in advance so that the correct rules and procedures can be followed in line with the group’s procurement policies.

Sufficient time is assigned to the project with targets set for producing design information for tender and key milestones. An example would be 5 to 10 working days for non-complex work, however where projects are of a complicated nature or requires multidiscipline input then the timescales are decided on the complexity and available resources. Each project would be monitored based on targets set by thirteen.

## The Requirements

* 1. **GDPR**: N/A.
  2. **Safeguarding**: N/A.
  3. **Health & Safety**: The consultant will adhere to thirteen Health and Safety Policies and Procedures.
  4. **Social value**: <https://app.impactreporting.co.uk/procurement/6W6pv2DLGOd6>
  5. **Environmental assessment**: This is to be confirmed in line with thirteen requirements.
  6. **Carbon Footprint data**: N/A.
  7. **Customer input**: N/A.
  8. **TUPE** N/A.
  9. **Specific Project Requirements:**

What is the type of work: The mechanical and electrical design consultant would have a significant role contributing with all major design projects. They should be proficient in providing mechanical and electrical design, site support and advice, clerk of work duties and sign off, and tender analysis to ensure thirteen compliance with current regulatory requirements. Design liability relating to mechanical and electrical works would be the responsibility of and sit with the consultant. The consultant would be responsible for liaison with all local authority and utility providers to clarify specific design requirements. To support building compliance and fire safety works the consultant will be expected to liaise with fire and rescue services. The consultant will contribute information and specialist knowledge towards the Building Safety Regulator application process.

The consultant should have sufficient capacity and resources to work on multiple projects at any given time during the contract period.

Project request turn around timescales:

* Minor (value up to £25,000).
* Small (value up to £150,000).
* Medium (value up to £750,000).
* Large / Complex (value up to £3,000,000).

Qualification and Accreditation:

* The consultant will provide a list of personnel who will be working on this contract with their qualifications and experience within the respective field.
* The consultant should provide a list, details and evidence of any accreditation or specialist bodies that they are affiliated to. Details of any awards that the consultancy has been awarded for innovative design and key turn solution for bespoke projects could support this request.
* The assigned personnel for this contract must have relevant experience in electrical and mechanical works in social housing, with specific relation to complex buildings i.e. High Rise and Care and Support Schemes. Provide a narrative of any special projects that the practice has been engaged with and what role the respective person has played in overseeing the project.
* The consultant shall provide a list of 3 projects they have been involved in within the social housing or similar industry. A narrative of the scope of works will be provided inclusive of any complex works that involve in-depth research and development from concept to final design and delivery. The list must include two compliance related projects i.e., smoke ventilation and sprinkler system installations.
* The consultant should provide their structure specific to this contract which details roles and responsibilities, identifying who would be assigned to this contract and naming the contract manager who would manage this contract should they be successful. Details of how many staff are employed at the consultancy should be provided, inclusive of those not assigned to this contract.
* Over the recent years there has been a requirement to liaise with the local authorities and fire and rescue services relating to compliance and building fire safety works, can the practice provide one project example of the level of communications pertaining to works carried out in a complex building. The example must include initial application and outcome for the project where the organisation has been involved with planning application with a local authority. Where the practice has been involved with projects liaising with the fire and rescue service on behalf of the client, please provide details of the level of engagement and project outcome.

## Performance Requirements

* 1. The consultant will be required to deliver and meet thirteen KPIs which will be agreed once they have been awarded this contract. The KPIs will be derived from the Asset Plan and linked to delivery timescales.
  2. The consultant must have sufficient resources for the full duration of the contract and must meet project delivery targets set out for the respective projects. This resource must be directly employed by the consultant and not outsourced.
  3. The consultant must provide the design information requested in line with agreed timescales and must keep Thirteen representatives updated on progress by agreed communication methods at agreed intervals, all within agreed project requirements.
  4. The consultant contract manager must attend agreed meetings for contract performance management which may be held weekly, fortnightly, or bimonthly depending on project complexity and workload. The meetings will be held in person or via teams as project requirements dictate.
  5. The consultant will work a in line with Thirteens values and behaviors.

## Performance Measurement

* 1. The successful consultant will provide evidence of the agreed KPIs, performance results against the set targets and workload plans.
  2. The successful consultant contract manager (or nominated representative as agreed) must attend contract performance management meetings in line with item 4.4.
  3. The successful consultant shall provide financial details in an understandable format for fees claimed. This must include analysis of cost for each project, and any variation that may have arisen during the project.

## Implementation

* 1. The implementation and mobilisation will commence once all the necessary procurement processes have been completed.

The consultant will be expected to start work immediately and a pre-contract meeting will be held to discuss live projects, and future projects.

## Contract Management

* 1. Within this contract there will be a requirement to hold regular management meetings to discuss and approve design work; furthermore, discuss workloads and time management for the projects in hand. As part of the management meetings financial matters will be discussed to ensure compliance with standing orders and thirteen financial and accountancy rules.

Further to the above there will be a requirement to produce KPI for evidence for value for money against the contract.

Performance will be monitored on completion of projects, including success of delivery and commissioning.

## Contract Pricing

* 1. The contract pricing will remain fixed for the first 24 months of the contract agreement.

Any price increase request at the end of the fixed pricing period above must be based on CPI/RPI pricing index and agreed in advance by THG.

The fee percentages will be proportional to the value of the work and shall be fixed for the duration of the contact period (as detailed in the pricing schedule).

* 1. In the event there is a change in legislation arising from a change in law, increased costs arising from this event will be discussed and negotiated.

## Tender Timetable

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| **Tender Timetable** | **Date** |
| Invitation to Tender Issued | **19/02/2024** |
| Clarifications via portal close date | **28/02/2024** |
| Site Visits (if required) | N/A. |
| Tender Return Deadline | 29/02/2024 |
| Evaluation Dates | **29/02/2024-01/03/2024** |
| Clarification Interviews (If required) | 29/02/2024-07/03/2024 |
| Notification of the Award Decision | 08/03/2024 |
| 10 Day Standstill Period (above Threshold) | 08/03/2024-18/03/2024 |
| Contract Commencement | **24/03/2024** |

## Tender Evaluation and Award criteria

* 1. THG reserves the right to seek clarification from any or all of the Potential Providers during the evaluation period. This may be in writing or by means of a clarification meeting. This is to help the THG to consider the Tenders.
  2. THG may decide to interview Potential Providers or hold clarification meetings to help in the Tendering process. THG will notify Potential Providers of this in due course.
  3. THG will only evaluate documents which have been requested as part the tender submission. Any additional documents uploaded on the e-tendering portal as part of your submission, which have not been requested, will not be evaluated.
  4. THG will evaluate Tenders to determine the Most Advantageous Tender (MAT) taking into consideration the published award criteria:
  5. THG give no warranty as to the accuracy or completeness of the information contained within this Tender, THG also disclaims any liability for any inaccuracy or incompleteness.
  6. All bidders will be deemed to fully understand the processes that THG must follow under relevant European and UK legislation, particularly The Public Contracts Regulations 2015.
  7. If THG receives only one tender in relation to this tender, the Potential Provider will be awarded the contract provided that they meet the Minimum Total Score of 42% Quality Threshold.
  8. If two or more Potential Providers obtain the highest total score, the Potential Provider with the highest score for the question 5 element of the tender evaluation will be deemed the winner and awarded the Contract.
  9. THG requires Potential Providers to achieve a minimum of 42% of the quality score to enable them to be taken to the pricing stage.

## Contract Particulars

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| **Item** | **Contract Details** |
| Tender reference | Find a Tender Published 14/02/2024  Contract reference: THIR 23 930 |
| Contract Commencement | 24/03/2024 |
| Contract Description | Mechanical and Electrical Consultancy Design Services and Clerk of Work Duties. |
| Insurance Requirements | Minimum Insurance Requirements  Employers Liability £10,000,000.00 for each and every claim.  Public Liability – No less than £5,000,000.00 for each and every claim.  Professional indemnity – No less than £5,000,000.00 for each claim. |
| Period of contract | The maximum contract term will be 2 years + 1 year |
| Contract Terms & Conditions | THG standards goods & services |
| Additional Terms & Conditions | N/A. |
| THG Procuring Officer | Michael Alderson: Category Manager. |
| THG Contract Manager | Paul Kirton: Design Service Manager. |