

Invitation to tender

Attachment 3f – Price Model and Price Evaluation Guidance

**RM6267** Construction Works and Associated Services 2/ProCure 23

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Annex A – Qualifications and Experience Definitions

These instructions are applicable for all five (5) Lots for the Construction Works and Associated Services 2 / ProCure 23 (CWAS2/P23) Framework Alliance Contract (FAC).

Bidders responding to this tender shall read and fully understand how the price model workbooks are completed and adhere to these instructions on how to complete the price model and how it will be evaluated.

These instructions apply to Bidders submitting a tender for one or more Lots either in their own name or as part of a Group of Economic Operators (or consortium).

References to “Client” or “Additional Client(s)” in the CCS CWAS2/P23 Framework Alliance Contract and associated documentation shall be interpreted as meaning “Contracting Authority” for the purposes of the Public Contracts Regulations 2015 (and vice versa).

**INTRODUCTION TO PRICE MODEL WORKBOOKS**

## Introduction

* 1. These instructions are provided to assist all Bidders in the completion of the price model workbooks. Bidders shall also ensure that they read these instructions in conjunction with, and comply with any instruction contained within, the individual price model workbooks.
  2. Bidders shall note that any definitions or guidance as to coverage of rates and the like provided within these instructions shall be deemed to be incorporated into any framework agreement ultimately entered into if successful and shall subsequently apply to rates included as framework rates.

## Overall Approach

* 1. Bidders are required to submit Prices for percentage fees, percentage additions to net cost, time charges and other miscellaneous rates within the price model workbooks, as appropriate, for each Lot for which they are submitting a tender.
  2. All Prices and rates submitted by Bidders are maximums to be applied, unless reduced by further competition or as a result of a negotiated reduction in a single source procurement or other process.

Additional Clients have the absolute discretion, when establishing their procurement strategy for a Project Contract(s), to determine the most appropriate method for incorporating the Prices and rates into their contract. As an example, when utilising a cost reimbursable arrangement such as an NEC Option C contract, an Additional Client may choose to use either actual (Defined) cost or (by incorporation of an appropriate clause amendment) the tendered and pre-agreed design hourly rates. The chosen methodology will be stated in the Project Brief for individual Project Contracts.

* 1. Lots 1,2,3 & 5 are general construction Lots and Lot 4 is a specialist operational area. Lot 1 will be further subdivided into Regional Sub-Lots, in which case Bidders must indicate at the beginning the price model workbook which Regional Sub-Lots they do or do not wish to bid for. The Bidder shall complete all necessary cells in the workbook(s) (Attachments 3a to 3e) applicable to each Lot/Sub-Lot for which it is submitting a bid. These cells are highlighted green. No data shall be entered into cells highlighted red. Any Bidder who fails to fully complete a price model workbook for a Lot for which it is submitting a bid, may be excluded from further participation in the procurement of that Lot.
  2. The groupings of general construction or specialist operational areas by Lot are provided in paragraph 3 below. The Prices submitted by the Bidder within each completed price model workbook will be evaluated in accordance with the methodology relevant to that Lot described within this document.
  3. Weightings, as set out in each price model workbook, will be applied to the Prices submitted when evaluating Prices.

## Groupings

* 1. The table below sets out the groupings of value banded general construction or specialist operational areas by Lot.

|  |  |
| --- | --- |
| Lot Description | Price model workbooks to be completed |
| Lot 1 - P23 – Healthcare Solution Provider <£20M | |
| England Regional Sub-Lots covering following NUTS codes (see para 3.2):   * 1.1 - UKC & UKE - North East (Includes Yorkshire and the Humber) * 1.2 - UKD - North West * 1.3 - UKF & UKG - Midlands (East & West) * 1.4 - UKH - East of England * 1.5 - UKI - London * 1.6 - UKJ - South East * 1.7 - UKK - South West | Lot 1 Workbook |
| Lot 2 - P23 – Healthcare Solution Provider £20M - £70M – England | |
| England Lot covering following NUTS codes (see para 3.2):   * UKC – UKK | Lot 2 Workbook |
| Lot 3 – P23 – Healthcare Solution Provider > £70M | |
| England Lot covering following NUTS codes (see para 3.2):   * UKC – UKK | Lot 3 Workbook |
| Lot 4 – CWAS2 - Airfields | |
| National Lot covering all UK NUTS codes (see para 3.2):   * UKC – UKN | Lot 4 Workbook |
| Lot 5 – CWAS2 - Construction Works and Associated Services (£80m +) | |
| National Lot covering all UK NUTS codes (see para 3.2):   * UKC – UKN | Lot 5 Workbook |

* 1. Regional boundaries for all lots are defined by reference to the Eurostat Nomenclature of Territorial Units for Statistics (NUTS) codes, as follows:

|  |  |
| --- | --- |
| Code | Region |
| UKC | North East |
| UKD | North West |
| UKE | Yorkshire & The Humber |
| UKF | East Midlands |
| UKG | West Midlands |
| UKH | East of England |
| UKI | Greater London |
| UKJ | South East |
| UKK | South West |
| UKL | Wales |
| UKM | Scotland |
| UKN | Northern Ireland |

## The Price Model Workbooks

* 1. The pricing approach described in this document and adopted for Lots 1 – 5 is slightly different for each lot and described in this guidance document below.
  2. The worksheets are protected to ensure that only the required information is provided. Worksheets must not be unprotected, copied or amended in any way. Any Bidder who unprotects, copies, amends or otherwise modifies the price model workbooks in any way may be excluded from further participation in this procurement.
  3. Detailed instructions related to each Lot are provided below.
  4. A separate price model workbook is provided for each Lot (in Microsoft Excel format).
  5. The Bidder shall refer to the table at paragraph 3.1 above, to determine the relevant price model workbook(s) applicable to the Lot(s) for which it is submitting a tender.
  6. Bidders must comply with all constraints described elsewhere within the Attachment 2

– How to Bid when submitting bids for multiple Lots.

* 1. Lots 1 to 3 price model workbook contains ten (10) worksheets, which are described in the table below:-

|  |  |  |
| --- | --- | --- |
| **Tab** | **Worksheet Title** | **Description** |
| 1 | Title Page | The title page indicates the Lot included in the workbook. |
| 2 | ID & Sub-Lot Selection | Bidders shall insert their company name here.  Where the particular Lot is subdivided into Regional Sub-Lots, the Bidders shall indicate which Sub-Lots they wish to submit a tender for. |
| 3 | Overhead Profit and Fee Additions | Bidders shall provide the Maximum percentage additions to be applied to stated Project Contract scenarios for each of the Sub-Lots/Lots selected. |
| 4 | Not used | Not used |
| 5 | Not used | Not used |
| 6 | Not used | Not used |
| 7 | Rate Card – Staff & Management | Bidders shall provide all-in hourly rates for each of the listed disciplines for each of the Sub-Lots and Lots selected. |
| 8 | Not used | Not used |
| 9 | Not used | Not used |
| 10 | Evaluation Data | Bidders do not complete anything on this sheet.  It is provided for information only to show the data to be taken forward for evaluation. |

* 1. Lots 4 & 5 price model workbook contains ten (10) worksheets, which are described in the table below:-

|  |  |  |
| --- | --- | --- |
| **Tab** | **Worksheet Title** | **Description** |
| 1 | Title Page | The title page indicates the Lot included in the workbook. |
| 2 | ID | Bidders shall insert their company name here. |
| 3 | Overhead Profit and Fee Additions | Bidders shall provide the Maximum percentage additions to be applied to stated Project Contract scenarios for each of the Lots selected. |
| 4 | Not used | Not used |
| 5 | Not used | Not used |
| 6 | Not used | Not used |
| 7 | Rate Card – Staff & Management | Bidders shall provide all-in hourly rates for each of the listed disciplines for each of the Lots selected. |
| 8 | Rate Card – Design | Bidders shall provide all-in hourly rates for each of the listed disciplines for each of the Lots selected. |
| 9 | Rate Card – Site Labour | Bidders shall provide all-in hourly rates for each of the listed disciplines for each of the Lots selected. |
| 10 | Evaluation Data | Bidders do not complete anything on this sheet.  It is provided for information only to show the data to be taken forward for evaluation. |

* 1. Bidders who are submitting a tender for more than one Lot **must** complete the separate relevant price model workbook for each Lot for which they are submitting a tender.
  2. For Lot 1 within the price model workbook for this Lot, Bidders may submit a tender for more than one Regional Sub-Lot.
  3. If a fully completed price model workbook is not submitted by the Bidder for each Lot for which the Bidder has submitted a bid, this may be deemed to be a non-compliant bid for the Lot in question. This may result in the Bidder being excluded from further participation in this procurement for that Lot.
  4. You must upload your completed price model workbook as an attachment to questions PQ1 to PQ5 within the commercial envelope of the eSourcing tool. It should be applicable to each Lot for which you are submitting a bid.

## Abnormally Low Tenders

* 1. Bidders are advised that any tender containing a rate or price that appears abnormally low will be scrutinised. Bidders’ attention is drawn to the requirements of Regulation 69 of the Public Contract Regulations 2015, which permits any tender that is considered abnormally low to be disregarded or rejected.
  2. Any Bidder who submits a tender Price that appears abnormally low in relation to other Bidders’ tendered Price for any individual price element (whether that be a percentage addition, fee, time charge or other charge) may be required to explain and/or validate the price or costs proposed in the tender by the Client for that particular price element, as it may be deemed to be abnormally low.
  3. This provision may, at the Client’s discretion as deemed most appropriate, be applied to the aggregated averages of a Bidder’s price or to individual price elements of a Lot.

## Instructions for Completion of Price Model Workbooks – Lot 1

* 1. Sheet 2: ID & Sub-Lot Selection

|  |  |
| --- | --- |
| **Lot 1** | |
| a) Company Name | Enter the trading name of the Bidder |
| b) Selection of Regional Sub-Lots | Complete each of the 7 green boxes by selecting “Y” or “N” from the drop down list in each cell.  The diagram on the right of the sheet shows the geographical locations of each of the UK NUTS codes. For further information see: https://ec.europa.eu/eurostat/documents/345175/7451602/nuts-map-UK.pdf  Note: do not leave any cells blank – you must select “Y” or “N” |

* 1. Sheet 3: Overhead, Profit and Fee Additions

|  |  |  |
| --- | --- | --- |
|  | **Lot 1** | |
| Percentages | | Maximum percentage additions to be applied in the listed Project Contract scenarios and has three call-off Project Contract value bands.  Insert the required percentage for each Region in each of the green cells with text “Insert %”.  Cells for Regional Sub-Lots which the Bidder has chosen not to tender will be highlighted red, with text “n/a” and must not be changed. |
| Format rules | | Enter a number between 0 and 100 with maximum 2 decimal places. E.g. 9.65% should be entered as “9.65”  Any numbers with 3 or more decimal places will be rounded to 2 decimal places during evaluation and also for any successful Framework Prices. |
| Errors | | If the Regional Sub-Lots have not been selected on Sheet 2, the relevant cells will be highlighted orange and flag an error message to complete the Sub-Lot Selection sheet before continuing. |
| Definitions | | The definitions relevant to the application of the percentage additions are as follows:  NEC4 Option A - fee percentage: see NEC4 ECC contract – identified term in Contract Data Part 2.  NEC4 Option C - fee percentage: see NEC4 ECC contract – identified term in Contract Data Part 2.  NEC4 Short Contract - fee percentage: see NEC4 ECC contract – identified term in Contract Data Part 2.    The fee percentage should also cover Framework delivery charges, including all other costs associated with managing the framework requirements and not covered elsewhere by the Bidder. It is deemed to include all costs associated with complying with the activities required by the framework terms and conditions including, but not limited to, the provision of Management Information and full participation in alliancing activities  **Note**: copies of the above contract forms have been made available to Bidders - see Attachment 1, paragraph 11 of the Invitation to Tender pack. |
| Weighting and Evaluation | | There will then be 3 categories of percentage addition based on expected values of call-off Project Contracts.  The percentages are carried forward to Sheet 10 – Evaluation Data and average is calculated for each category under each Sub-Lot.  Each category will be evaluated separately under that Sub-Lot.  Each category will have a contribution towards the total available 24% quantitative score for this cost element under that Sub-Lot. |

* 1. Sheet 4: Not used
  2. Sheet 5: Not used
  3. Sheet 6: Not used
  4. Sheet 7: Rate Card: Staff & Management

|  |  |  |
| --- | --- | --- |
|  | **Lot 1** | |
| Hourly rates | | Maximum Hourly Rates to be charged when calculating Project Contract tender prices and for use in calculating the cost of changes instructed in a Project Contract.  A rate must be entered for every discipline.  Insert the maximum required hourly rate for each discipline in each Region in each of the green cells with text “Insert £”.  Cells for Regional Sub-Lots which Bidder has chosen not to tender will be highlighted red, with text “n/a” and must not be changed. |

|  |  |
| --- | --- |
| Format rules | Enter number over 0 with maximum 2 decimal places. E.g.  £25.50 should be entered as “25.50”  Any numbers with 3 or more decimal places will be rounded to 2 decimal places during evaluation and also for any successful Framework Prices. |
| Errors | If the Regional Sub-Lots have not been selected on Sheet 2, the relevant cells will be highlighted orange and flag an error message to complete the Sub-Lot Selection sheet before continuing.  Entering a value in a red cell will highlight the Sub-Lot title red and flag an error message to correct before continuing. |
| Definitions | Refer to the appended "Qualifications & Experience Definitions" table for the required Qualifications and Experience of each role.  Rates shall apply to all hours worked between the hours of 08:00 – 18:00 Monday to Friday and 08:00 – 13:00 Saturday. Any additions required for work required to be carried out outside of these hours shall be agreed in advance with the Additional Client of each Project Contract, failing which these rates shall apply.  Hourly rates are chargeable only for hours actually worked. Breaks and time spent on non-project work are not chargeable and any allowance for such items must be included within the rates.  Rates must be all inclusive. Allowances for the following must be included:   * training, annual leave, sickness, general staff meetings and the like. * all costs in connection with travel and equipment * taxes, levies, employee and employer pension contributions and the like. * benefits provided, such as company car, fuel allowances, private health insurance and the like. * National Insurance contributions increase coming in from April 2022.   Note: the above list is non-exhaustive and illustrative only. All costs must be included within the rates. No further additions will be permissible. |
| Weighting and Evaluation | The table on the right hand side shows the weightings to be applied to each discipline and then applies those weightings to each discipline rate in each Region.  The average of the Region weighted hourly rates is calculated and this is carried forward to Sheet 10 – Evaluation Data. |

* 1. Sheet 8: Not used
  2. Sheet 9: Not used
  3. Sheet 10: Evaluation Data

|  |  |  |
| --- | --- | --- |
|  | **Lot 1** | |
| Generally | | Bidders are not required to enter any data on this sheet.  The sheet is provided for information only to show the information that will be carried forward for evaluation, after the application of any weightings; calculation of averages etc. |

## Instructions for Completion of Price Model Workbooks – Lot 2

* 1. Sheet 2: ID

|  |  |
| --- | --- |
| **Lot 2** | |
| a) Company Name | Enter the trading name of the Bidder |

* 1. Sheet 3: Overhead, Profit and Fee Additions

|  |  |  |
| --- | --- | --- |
|  | **Lot 2** | |
| Percentages | | Maximum percentage additions to be applied in the listed Project Contract scenarios and split into two categories based on value.  Insert the required Overhead percentage for each Region in each of the green cells with text “Insert %”.  Note that, although this is A England Lot, Bidders may enter different percentages for the 2 identified regional areas, if applicable. |
| Format rules | | Enter a number between 0 and 100 with maximum 2 decimal places. E.g. 9.65% should be entered as “9.65”  Any numbers with 3 or more decimal places will be rounded to 2 decimal places during evaluation and also for any successful Framework Prices. |
| Definitions | | The definitions relevant to the application of the percentage additions are as follows:  NEC4 Option A - fee percentage: see NEC4 ECC contract – identified term in Contract Data Part 2.  NEC4 Option C - fee percentage: see NEC4 ECC contract – identified term in Contract Data Part 2.  The fee percentage should also cover Framework delivery charges, including all other costs associated with managing the framework requirements and not covered elsewhere by the Bidder. It is deemed to include all costs associated with complying with the activities required by the framework terms and conditions including, but not limited to, the provision of Management Information and full participation in alliancing activities  **Note**: copies of the above contract forms have been made available to Bidders - see Attachment 1, Section 11 of the Invitation to Tender pack |
| Weighting and Evaluation | | There will then be 2 categories of percentage addition based on expected value of call-off Project Contracts .  The table on the right hand side shows the excluding London & London weightings to be applied to each Fee percentage and then applies those weightings.  These weightings are then carried over to Sheet 10 - Evaluation Data and total average Fee Percentage for each category is then calculated.  Each category will be evaluated separately.  Each category will have a contribution towards the total available 24% quantitative score for this cost element. |

* 1. Sheet 4: Not used
  2. Sheet 5: Not used
  3. Sheet 6: Not used
  4. Sheet 7: Rate Card: Staff & Management

|  |  |  |
| --- | --- | --- |
|  | **Lot 2** | |
| Hourly rates | | Maximum Hourly Rates to be charged when calculating Project Contract tender prices and for use in calculating the cost of changes instructed in a Project Contract.  A rate must be entered for every discipline and every Region.  Insert the maximum required hourly rate for each discipline in each Region in each of the green cells with text “Insert £”. |

|  |  |
| --- | --- |
| Format rules | Enter a number over 0 with maximum 2 decimal places. E.g.  £25.50 should be entered as “25.50”  Any numbers with 3 or more decimal places will be rounded to 2 decimal places during evaluation and also for any successful Framework Prices. |
| Definitions | Refer to the appended "Qualifications & Experience Definitions" table for the required Qualifications and Experience of each role.  Rates shall apply to all hours worked between the hours of 08:00 – 18:00 Monday to Friday and 08:00 – 13:00 Saturday. Any additions required for work required to be carried out outside of these hours shall be agreed in advance with the Additional Client of each Project Contract, failing which these rates shall apply.  Hourly rates are chargeable only for hours actually worked. Breaks and time spent on non-project work are not chargeable and any allowance for such items must be included within the rates.  Rates must be all inclusive. Allowances for the following must be included:   * training, annual leave, sickness, general staff meetings and the like. * all costs in connection with travel and equipment * taxes, levies, employee and employer pension contributions and the like. * benefits provided, such as company car, fuel allowances, private health insurance and the like. * National Insurance contributions increase coming in from April 2022.   Note: the above list is non-exhaustive and illustrative only. All costs must be included within the rates. No further additions will be permissible. |
| Weighting and Evaluation | The table on the right hand side shows the weightings to be applied to each discipline and then applies those weightings to each discipline rate in both Regions.  The average of the weighted hourly rates is calculated and further England excluding London and London regional weighting is applied. An average of regional weighted hourly rate is carried forward to Sheet 10 – Evaluation Data. |

* 1. Sheet 8: Not used
  2. Sheet 9: Not used
  3. Sheet 10: Evaluation Data

|  |  |  |
| --- | --- | --- |
|  | **Lot 2** | |
| Generally | | Bidders are not required to enter any data on this sheet.  The sheet is provided for information only to show the information that will be carried forward for evaluation, after the application of any weightings; calculation of averages etc. |

## Instructions for Completion of Price Model Workbooks – Lot 3

* 1. Sheet 2: ID

|  |  |
| --- | --- |
| **Lot 3** | |
| a) Company Name | Enter the trading name of the Bidder |

* 1. Sheet 3: Overhead, Profit and Fee Additions

|  |  |  |
| --- | --- | --- |
|  | **Lot 3** | |
| Percentages | | Maximum percentage additions to be applied in the listed Project Contract scenarios.  Insert the required Overhead percentage for each Region in each of the green cells with text “Insert %”.  Note that, although this is a National Lot, Bidders may enter different percentages for the 2 identified regional areas, if applicable. |
| Format rules | | Enter a number between 0 and 100 with a maximum 2 decimal places. E.g. 9.65% should be entered as “9.65”  Any numbers with 3 or more decimal places will be rounded to 2 decimal places during evaluation and also for any successful Framework Prices. |
| Definitions | | The definitions relevant to the application of the percentage additions are as follows:  NEC4 Option A - fee percentage: see NEC4 ECC contract – identified term in Contract Data Part 2.  NEC4 Option C - fee percentage: see NEC4 ECC contract – identified term in Contract Data Part 2.  The fee percentage should also cover Framework delivery charges, including all other costs associated with managing the framework requirements and not covered elsewhere by the Bidder. It is deemed to include all costs associated with complying with the activities required by the framework terms and conditions including, but not limited to, the provision of Management Information and full participation in alliancing activities  Note: copies of the above contract forms have been made available to Bidders - see Attachment 1, Section 11 of the Invitation to Tender pack. |
| Weighting and Evaluation | | There will then be 1 category of percentage addition.  The table on the right hand side shows the excluding London & London weightings to be applied to each Fee percentage and then applies those weightings.  Total average percentage is then calculated and is carried forward to Sheet 10 – Evaluation Data.  This Category will then contribute fully forming a 24% quantitative score for this cost element. |

* 1. Sheet 4: Not used
  2. Sheet 5: Not used
  3. Sheet 6: Not used
  4. Sheet 7: Rate Card: Staff & Management

|  |  |  |
| --- | --- | --- |
|  | **Lot 3** | |
| Hourly rates | | Maximum Hourly Rates to be charged when calculating Project Contract tender prices and for use in calculating the cost of changes instructed in a Project Contract.  A rate must be entered for every discipline and every Region.  Insert the maximum required hourly rate for each discipline in each Region in each of the green cells with text “Insert £”.  Please ensure that you do not enter a rate below National Minimum Wage for any price cells. If you do this, your bid may be deemed non-compliant and your bid for that Lot may be excluded from further participation in this procurement.  Note that, although this is a England only Lot, Bidders may enter different rates for the 2 identified regional areas, if applicable. |
| Format rules | | Enter number over 0 with maximum 2 decimal places. E.g.  £25.50 should be entered as “25.50”  Any numbers with 3 or more decimal places will be rounded to 2 decimal places during evaluation and also for any successful Framework Prices. |
| Definitions | | Refer to the appended "Qualifications & Experience Definitions" table for the required Qualifications and Experience of each role.  Rates shall apply to all hours worked between the hours of 08:00 – 18:00 Monday to Friday and 08:00 – 13:00 Saturday. Any additions required for work required to be carried out outside of these hours shall be agreed in advance with the Additional Client of each Project Contract, failing which these rates shall apply.  Hourly rates are chargeable only for hours actually worked. Breaks and time spent on non-project work are not chargeable and any allowance for such items must be included within the rates.  Rates must be all inclusive. Allowances for the following must be included:   * training, annual leave, sickness, general staff meetings and the like. * all costs in connection with travel and equipment * taxes, levies, employee and employer pension contributions and the like. * benefits provided, such as company car, fuel allowances, private health insurance and the like. * National Insurance contributions increase coming in from April 2022.   Note: the above list is non-exhaustive and illustrative only. All costs must be included within the rates. No further additions will be permissible. |
| Weighting and Evaluation | | The table on the right hand side shows the weightings to be applied to each discipline and then applies those weightings to each discipline rate in both Regions.  The average of the weighted hourly rates is calculated and further England excluding London and London regional weighting is applied. An average of regional weighted hourly rate is carried forward to Sheet 10 – Evaluation Data. |

* 1. Sheet 8: Not used
  2. Sheet 9: Not used
  3. Sheet 10: Evaluation Data

|  |  |  |
| --- | --- | --- |
|  | **Lot 3** | |
| Generally | | Bidders are not required to enter any data on this sheet.  The sheet is provided for information only to show the information that will be carried forward for evaluation, after the application of any weightings; calculation of averages etc. |

## Instructions for Completion of Price Model Workbooks – Lots 4 & 5

* 1. Sheet 2: ID

|  |  |
| --- | --- |
| **Lots 4 & 5** | |
| a) Company Name | Enter the trading name of the Bidder |

* 1. Sheet 3: Overhead, Profit and Fee Additions

|  |  |  |
| --- | --- | --- |
|  | **Lots 4 & 5** | |
| Percentages | | Maximum percentage additions to be applied in the listed Project Contract scenarios.  Insert the required Overhead percentage for each Region in each of the green cells with text “Insert %”.  Note that, although this is a National Lot, Bidders may enter different percentages for the 5 identified regional areas, if applicable. |
| Format rules | | Enter a number between 0 and 100 with maximum 2 decimal places. E.g. 9.65% should be entered as “9.65”  Any numbers with 3 or more decimal places will be rounded to 2 decimal places during evaluation and also for any successful Framework Prices. |
| Definitions | | The definitions relevant to the application of the percentage additions are as follows:  NEC3 direct fee percentage: see NEC3 ECC contract – identified term in Contract Data Part 2.  NEC4 fee percentage: see NEC4 ECC contract – identified term in Contract Data Part 2.  JCT / SBCC Constructing Excellence: Supplier’s Margin – see Constructing Excellence contracts: defined term in Section 1 – Definitions and Interpretations.  JCT / SBCC Contracts other than Constructing Excellence: overhead and profit shall be as defined below.  PPC2000 Central Office Overheads – see PPC2000 contract: defined term in Appendix 1 – Definitions.  PPC2000 Constructor’s Profit – see PPC2000 contract: defined term in Appendix 1 – Definitions.  **Note**: copies of the above contract forms have been made available to Bidders - see Attachment 1 Section 11 of the Invitation to Tender pack.  “Overhead” includes activities relating to non-site based supervisory/management and administration activities of the service delivery. It includes, but is not limited to, the following:   1. a) Head office charges; support staff; non-project specific insurance premiums; finance charges; taxation charges; advertising and recruitment costs; sureties and guarantees; property costs; external advisors; marketing; tendering activities. 2. Framework delivery charges, including all other costs associated with the Framework requirements and not covered elsewhere by the Bidder's direct cost of construction, Subcontractor Fee, Designer's Fee, Head Office Overhead or Profit. For the avoidance of doubt, it is deemed to include all costs associated with complying with the Framework terms and conditions including, but not limited to, the provision of Management Information and full participation in alliancing activities.   “Profit” is the % margin the Bidder will achieve after accounting for all costs and expenses. |
| Weighting and Evaluation | | For the purposes of evaluation, the PPC2000 Central Office Overheads and Constructor’s Profit percentages will be added together. There will then be 6 categories of percentage addition.  The percentages are carried forward to Sheet 10 – Evaluation Data.  Each category will be evaluated separately.  Each category will have a contribution towards the total available 24% quantitative score for this cost element. |

* 1. Sheet 4: Not used
  2. Sheet 5: Not used
  3. Sheet 6: Not used
  4. Sheet 7: Rate Card: Staff & Management Sheet 8: Rate Card: Design

Sheet 9: Rate Card: Site Labour

|  |  |
| --- | --- |
| **Lots 4 & 5** | |
| Hourly rates | Maximum Hourly Rates to be charged when calculating Project Contract tender prices and for use in calculating the cost of changes instructed in a Project Contract.  A rate must be entered for every discipline and every Region.  Insert the maximum required hourly rate for each discipline in each Region in each of the green cells with text “Insert £”.  Note that, although this is a National Lot, Bidders may enter different rates for the 5 identified regional areas, if applicable  Please ensure that you do not enter a rate below National Minimum Wage for any price cells. If you do this, your bid may be deemed non-compliant and your bid for that Lot may be excluded from further participation in this procurement.  . |
| Format rules | Enter number over 0 with maximum 2 decimal places. E.g.  £25.50 should be entered as “25.50”  Any numbers with 3 or more decimal places will be rounded to 2 decimal places during evaluation and also for any successful Framework Prices. |
| Definitions | Refer to the appended "Qualifications & Experience Definitions" table for the required Qualifications and Experience of each role.  Rates shall apply to all hours worked between the hours of 08:00 – 18:00 Monday to Friday and 08:00 – 13:00 Saturday. Any additions required for work required to be carried out outside of these hours shall be agreed in advance with the Additional Client of each Project Contract, failing which these rates shall apply.  Hourly rates are chargeable only for hours actually worked. Breaks and time spent on non-project work are not chargeable and any allowance for such items must be included within the rates.  Rates must be all inclusive. Allowances for the following must be included:   * training, annual leave, sickness, general staff meetings and the like. * all costs in connection with travel and equipment * taxes, levies, employee and employer pension contributions and the like. * benefits provided, such as company car, fuel allowances, private health insurance and the like. * National Insurance contributions increase coming in from April 2022.   Note: the above list is non-exhaustive and illustrative only. All costs must be included within the rates. No further additions will be permissible. |
| Weighting and Evaluation | The table on the right hand side shows the weightings to be applied to each discipline and then applies those weightings to each discipline rate in each Region.  The average of the Region weighted hourly rates is calculated and this is carried forward to Sheet 10 – Evaluation Data. |

* 1. Sheet 10: Evaluation Data

|  |  |  |
| --- | --- | --- |
|  | **Lots 4 & 5** | |
| Generally | | Bidders are not required to enter any data on this sheet.  The sheet is provided for information only to show the information that will be carried forward for evaluation, after the application of any weightings; calculation of averages etc. |

# 

# PRICE EVALUATION

## Introduction to Evaluation Model

* 1. This section describes how Bidders’ Price submissions will be evaluated.
  2. The split between the weightings for Quality and Price in respect of this procurement are set out below:-

Quality: 70%

Price: 30%

* 1. Therefore, 30% of the total weighted score is allocated to the pricing element of each Lot. The Price weighting is further apportioned as follows:

## Lot 1, sub-lots 1.1 - 1.7:

|  |  |  |
| --- | --- | --- |
| **Pricing Sections** | **Pricing Elements / Categories** | **Weighting %** |
| Overhead, Profit & Fee Additions  (24%) | Average Fee Percentage for Value Band £0 to < £3m | 8.00 |
| Average Fee Percentage for Value Band £3m to < £10m | 8.00 |
| Average Fee Percentage for Value Band £10m to < £20m | 8.00 |
| Rate Cards (6%) | Management & Staff | 6.00 |
| **TOTAL** | | **30%** |

**Lot 2:**

|  |  |  |
| --- | --- | --- |
| **Pricing Sections** | **Pricing Elements / Categories** | **Weighting %** |
| Overhead, Profit & Fee Additions  (24%) | Average Fee Percentage for Value Band £20m to < £50m | 12.00 |
| Average Fee Percentage for Value Band £50m to < £70m | 12.00 |
| Rate Cards (6%) | Management & Staff | 6.00 |
| **TOTAL** | | **30%** |

**Lots 3:**

|  |  |  |
| --- | --- | --- |
| **Pricing Sections** | **Pricing Elements / Categories** | **Weighting %** |
| Overhead, Profit & Fee Additions  (24%) | Average Fee Percentage for Value Band > £70m | 24.00 |
| Rate Cards (6%) | Management & Staff | 6.00 |
| **TOTAL** | | **30%** |

## Lots 4 & 5:

|  |  |  |
| --- | --- | --- |
| **Pricing Sections** | **Pricing Elements / Categories** | **Weighting%** |
| Overhead, Profit & Fee Additions  (24%) | NEC3 - direct fee percentage | 5.00 |
| NEC4 - fee percentage | 5.00 |
| JCT/SBCC: Constructing Excellence - supplier’s margin | 3.50 |
| JCT/SBCC: Prime Cost Contract - combined overhead and profit percentage | 3.50 |
| JCT/SBCC: Other - combined overhead and profit percentage | 3.50 |
| PPC2000 - central office overheads & constructor’s profit | 3.50 |
| Rate Cards (6%) | Management & Staff | 2.00 |
| Design | 2.00 |
| Site Labour | 2.00 |
| **TOTAL** | | **30%** |

* 1. Bidders’ Price Scores will be calculated using the combined total scores as defined in 10.3.
  2. Sections 6, 7, 8 and 9 and the price model workbooks describe weightings to be applied to individual cost elements and any initial calculations carried out to derive summary data carried forward for evaluation. Sheet 10 – Evaluation Data in each price model workbook shows the summary data to be carried forward for evaluation.
  3. Bidders shall note that all calculations within the price model workbooks, in order to arrive at the final data to be transferred for evaluation, are based on rounding calculations to two decimal places.

## Price Evaluation Process

* 1. **Introduction**
     1. The Bidder’s data collated within Sheet 10 – Evaluation Data in each price model workbook is transferred to the Price Evaluation workbook and evaluated against all other Bidders’ submitted tenders for each Lot or, where applicable, Sub-Lot.
     2. The Client will total all Bidders’ scores within the evaluation workbook.
     3. Bidders are reminded that bids will be assessed against a median threshold in accordance with paragraph 5 Abnormally Low Tenders.
     4. The general principle of evaluation is that data for each cost element is evaluated using a deviation from the optimal value methodology. For the purposes of evaluation, the optimal value is deemed to be the median value of all valid bids received for that cost element.
     5. The evaluation methodologies are the same for each cost element in each Lot and is described in detail in 11.2 below.

## Evaluation Methodology

11.2.1. Evaluation Data (as collated within Sheet 10 – Evaluation Data in each price model workbook) from all Bidders for each Lot or, where applicable, Sub-Lot is extracted and evaluated against all other Bidders’ submitted tenders for that Lot or Sub-Lot.

11.2.2 The optimal bid value is calculated as the median value of all valid submitted bids.

11.2.3 The variance of each bid from the optimal bid value is calculated and this is converted to an absolute (i.e. non-negative) value.

11.2.4 Bids exceeding 75% above or below the median bid are deemed to be uneconomic bids and score 0 for that pricing element/category only.

11.2.5 The remaining bids will have a weighting applied to the variance to favour variances less than the median bid relative to variances greater than the median bid. The weighting is as follows:

* + - * bid lower than optimal = x 0.75 weighting
      * bid higher than optimal = x 1.50 weighting

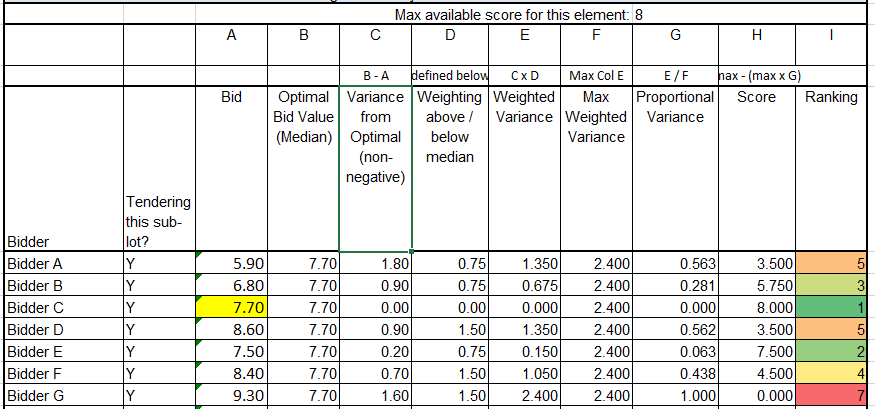
This results in a weighted variance for each bid.

11.2.6 The median bid will score full marks (30). Remaining non-excluded bids will be scored a reducing score according to their weighted variance from the median bid, in proportion to the bid with maximum variance (which will score 0).

11.2.7 Each Bidder’s score will be applied as a percentage to the maximum score for each pricing element to arrive at the pricing element contribution to the maximum total price element score of 30%.

11.2.8 The evaluation methodology is illustrated below with example data (please note that this and the following table are illustrative only to demonstrate the methodology – the data relates to a previous pricing model and is not transferred between):

Example of Methodology - Average Fee - (Maximum Contribution - 8%)

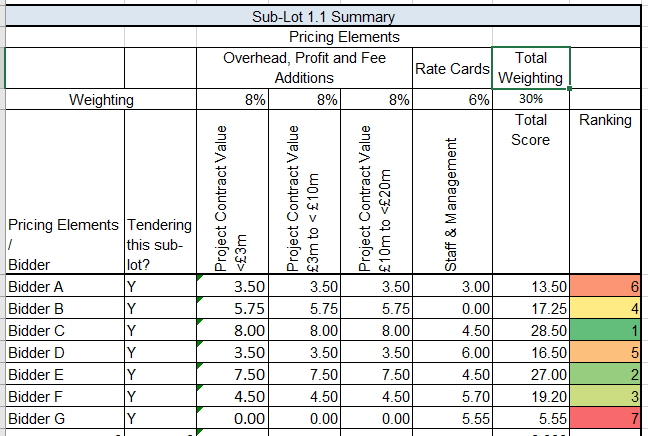


Note: 1. Bid value highlighted yellow indicates median bid.

2. Optimum value is deemed to be the median of all valid bids received.

3. Variances >75% above or below median score nil.

11.2.9 The individual element score contributions are then collated to arrive at the total price score out of a maximum of 30%. This is illustrated below with example data:





|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Annex A – Qualifications and Experience Definitions | | | | | | | | | | | | | |
| **Grade** | **Required Qualification & Experience \*\*\*\*** | **Discipline** | | | | | | | | | | | |
| **Project Manager** | **Quantity Surveyor (a)** | **Architect** | **Civil Eng** | **Struct Eng** | **Building Services Engineer**  **(b)** | **Planner / Project Controller** | **Principal Designer** | **Construction Manager** | **Health & Safety** | **BIM Manager** | **BIM Co-Ordinator** |
| Partner or Director | Professionally qualified Partner/Director (with at least 10 years post-professional qualification relevant experience) | FAPM or MAPM\*\*\* | FRICS or MRICS | FRIBA or ARIBA\*\* | FICE or MICE | FIStructE or MIStructE | FCIBSE or MCIBSE | FAPM or MAPM\*\*\* | One or more of: FRIBA or ARIBA\*\*; FICE or MICE; FIStructE or MIStructE; FCIBSE or MCIBSE Plus NEBOSH  or equivalent | One or more of: FCIOB or MCIOB; FRIBA or ARIBA\*\*; FRICS or MRICS; FICE or MICE;  FIStructE or MIStructE; FCIBSE or MCIBSE  Plus NEBOSH or equivalent | One or more of: CFIOSH or CMIOSH; FRIBA or ARIBA\*\*; FICE or MICE;  FIStructE or MIStructE; FCIBSE or MCIBSE  Plus NEBOSH or equivalent | One or more of: FRIBA or ARIBA\*\*; FICE or MICE; FIStructE or MIStructE; FCIBSE or MCIBSE Plus Evidence of demonstrable capability for the role | One or more of: FRIBA or ARIBA\*\*; FICE or MICE; FIStructE or MIStructE; FCIBSE or MCIBSE Plus Evidence of demonstrable capability for the role |
| Senior Professional | Professionally qualified Associate Partner/Director (with at least 5 years post- professional qualification relevant experience) | FAPM or MAPM\*\*\* | FRICS or MRICS | FRIBA or ARIBA\*\* | FICE or MICE | FIStructE or MIStructE | FCIBSE or MCIBSE | FAPM or MAPM\*\*\* | One or more of: FRIBA or ARIBA\*\*; FICE or MICE; FIStructE or MIStructE; FCIBSE or MCIBSE Plus NEBOSH  or equivalent | One or more of: FCIOB or MCIOB; FRIBA or ARIBA\*\*; FRICS or MRICS; FICE or MICE;  FIStructE or MIStructE; FCIBSE or MCIBSE  Plus NEBOSH or equivalent | One or more of: CFIOSH or CMIOSH; FRIBA or ARIBA\*\*; FICE or MICE;  FIStructE or MIStructE; FCIBSE or MCIBSE  Plus NEBOSH or equivalent | One or more of: FRIBA or ARIBA\*\*; FICE or MICE; FIStructE or MIStructE; FCIBSE or MCIBSE | One or more of: FRIBA or ARIBA\*\*; FICE or MICE; FIStructE or MIStructE; FCIBSE or MCIBSE |
| Professional | Professionally qualified Consultant (with at least 3 years post-professional qualification experience) | FAPM or MAPM\*\*\* | FRICS or MRICS | FRIBA or ARIBA\*\* | FICE or MICE | FIStructE or MIStructE | FCIBSE or MCIBSE | FAPM or MAPM\*\*\* | One or more of: FRIBA or ARIBA\*\*; FICE or MICE; FIStructE or MIStructE; FCIBSE or MCIBSE Plus NEBOSH  or equivalent | One or more of: FCIOB or MCIOB; FRIBA or ARIBA\*\*; FRICS or MRICS; FICE or MICE;  FIStructE or MIStructE; FCIBSE or MCIBSE  Plus NEBOSH or equivalent | One or more of: CFIOSH or CMIOSH; FRIBA or ARIBA\*\*; FICE or MICE;  FIStructE or MIStructE; FCIBSE or MCIBSE  Plus NEBOSH or equivalent | One or more of: FRIBA or ARIBA\*\*; FICE or MICE; FIStructE or MIStructE; FCIBSE or MCIBSE Plus Evidence of demonstrable capability for the role | One or more of: FRIBA or ARIBA\*\*; FICE or MICE;FIStructE or MIStructE; FCIBSE or MCIBSE |
| Assistant role or Senior Technician | Graduate on a recognised and accredited course for obtaining a professional qualification | BSc, BA,  BEng or MEng | BSc, BA, BEng  or MEng or AssocRICS | BSc, BA,  BEng or MEng or RIBA Assoc member | BSc, BA,  BEng, MEng, AMICE or  Eng Tech MICE | BSc, BA,  BEng, MEng, AMIStructE | BSc, BA,  BEng, MEng, ACIBSE | BSc, BA,  BEng or MEng | One or more of: BSc, BA, BEng, MEng, AMICE, Eng Tech MICE, AMIStructE, ACIBSE | One or more of: BSc, BA, BEng, MEng, ACIOB or ICIOB; AssocRICS, AMICE,  Eng Tech MICE,  AMIStructE, ACIBSE | One or more of: BSc, BA, BEng, MEng, GradIOSH, AMICE,  Eng Tech MICE, AMIStructE, ACIBSE | One or more of: BSc, BA, BEng, MEng, AMICE, Eng Tech MICE, AMIStructE, ACIBSE | One or more of: BSc, BA, BEng, MEng, AMICE, Eng Tech MICE, AMIStructE, ACIBSE |
| Technician | Graduate | BSc, BA,  BEng or MEng\* | BSc, BA, BEng  or MEng\* | BSc, BA,  BEng or MEng\* | BSc, BA,  BEng or MEng or Eng Tech MICE\* | BSc, BA,  BEng or MEng or TIStructE\* | BSc, BA,  BEng, MEng, LCIBSE or LCIBSE Eng  Tech\* | BSc, BA,  BEng or MEng\* | One or more of: BSc, BA, BEng, MEng, Eng Tech MICE, TIStructE, LCIBSE, LCIBSE Eng  Tech, completion of Higher Apprenticeship | One or more of: BSc, BA, BEng, MEng, ACIOB or ICIOB; Eng  Tech MICE, TIStructE, LCIBSE, LCIBSE Eng  Tech, completion of Higher Apprenticeship | One or more of: BSc, BA, BEng, MEng, TechIOSH, AIOSH, Eng  Tech MICE, TIStructE, LCIBSE, LCIBSE Eng  Tech, completion of Higher Apprenticeship | One or more of: BSc, BA, BEng, MEng, Eng Tech MICE, TIStructE, LCIBSE, LCIBSE Eng  Tech, completion of Higher Apprenticeship | One or more of: BSc, BA, BEng, MEng, Eng Tech MICE, TIStructE, LCIBSE, LCIBSE Eng  Tech, completion of Higher Apprenticeship |
| Admin/Junior Technician/ Apprentice/Trainee | Administration staff, Junior Technician (Trainee/Undergraduate) or Apprentice with Apprenticeship entry qualifications |  |  |  |  |  |  |  |  |  |  |  |  |

\*or completion of Higher Apprenticeship

\*\*or on the UK Register of Architects administered by the ARB, or equivalent.

\*\*\* the qualifications for PM where stated as FAPM/MAPM may also inlcude, as an alternative, personnel with the professional

qualifications listed for Quantity Surveyor, Architect, Civil Engineer, Structural Engineer and Building Services Engineer

\*\*\*\* the required Qualification and Experience for any disciplines not specifically identified in this schedule, shall be equivalent to the levels identified in this column.

(a) Qualifications & Experience Definitions for Quantity Surveyors also apply to roles designated as Commercial Manager / Procurement Manager and the like

(b) Qualifications & Experience Definitions for Building Services Engineer also apply to roles designated as Electrical Engineer / Mechanical Services / HVAC Engineer

/ Environmental Services Engineer and the like

# Glossary of Abbreviations

|  |  |
| --- | --- |
| FAPM | Fellow of the Association for Project Management |
| MAPM | Member of the Association for Project Management |
| FRICS | Fellow of the Royal Institute of Chartered Surveyors |
| MRICS | Member of the Royal Institute of Chartered Surveyors |
| AssocRICS | Associate of the Royal Institute of Chartered Surveyors |
| FRIBA | Fellow of the Royal Institute of British Architects |
| ARIBA | Associate of the Royal Institute of British Architects |
| FICE | Fellow of the Institution of Civil Engineers |
| MICE | Member of the Institution of Civil Engineers |
| AMICE | Associate Member of the Institution of Civil Engineers |
| Eng Tech MICE | Technician Member of the Institution of Civil Engineers |
| FIStructE | Fellow of the Institution of Structural Engineers |
| MIStructE | Chartered Member of the Institution of Structural Engineers |
| AMIStructE | Associate Member of the Institution of Structural Engineers |
| TIStructE | Technician Member of the Institution of Structural Engineers |
| FCIBSE | Fellow of the Chartered Institution of Building Services Engineers |
| MCIBSE | Member of the Chartered Institution of Building Services Engineers |
| ACIBSE | Associate of the Chartered Institution of Building Services Engineers |
| LCIBSE / LCIBSE Eng  Tech | Licentiate of the Chartered Institution of Building Services Engineers |
| CFIOSH | Chartered Fellow of the Institute of Occupational Safety & Health |
| CMIOSH | Chartered Member of the Institute of Occupational Safety & Health |
| GradIOSH | Graduate Member of the Institute of Occupational Safety & Health |
| TechIOSH | Technical Member of the Institute of Occupational Safety & Health |
| AIOSH | Associate Member of the Institute of Occupational Safety & Health |
| FCIOB | Fellow of the Chartered Institution of Building |
| MCIOB | Member of the Chartered Institution of Building |
| ACIOB | Associate of the Chartered Institution of Building |
| ICIOB | Incorporated member of the Chartered Institution of Building |
| BSc | Bachelor of Science |
| BA | Bachelor of Arts |
| BEng | Bachelor of Engineering |
| MEng | Master of Engineering |
| NEBOSH | National Examination Board in Occupational Safety and Health |
| ARB | Architect Registration Board |