**Industrial Dwellings Society**

**Contract for:**

**Internal Works Programme – Kitchens & Bathrooms Replace**ment

**Ref: IDS 001 Date: July 2023**

**Contract Administrator: Alvin Sum**

Invitation to Tender

Information and Evaluation Guide

Document 2

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**Information and Evaluation Guide**

# **Introduction**

## 1.1 All words and expressions used in these Instructions to Tenderers with an initial capital letter shall have the meanings set out in the Conditions of Contract.

## 1.2 The Industrial Dwellings Society (IDS) invites tenders for the Supply and Installation of Kitchens and Bathrooms and ancillary work to Housing properties.

1.3 The successful Tenderers will be required to provide the Contract in consideration for the prices stated in the Form of Tender supported by the Pricing Schedules.

## 1.4 These Instructions describe the IDS requirements for the work. The tendering process and the commercial terms on which IDS proposes to contract in due course with the successful Tenderers.

## 1.5 These Instructions to Tenderers also set out details for the Tenderer on the form and content of tenders which are invited and the timetable and other administrative arrangements for the tendering process.

## 1.6 Tenderers are, in accordance with the provisions set out below, invited to submit tenders by no later than noon on 30 July 2023.

# Tendering Timetable

## 2.1 It is intended to procure framework Contractors in accordance with Table 1 below.

|  |  |  |
| --- | --- | --- |
| **Stage** | **Activity** | **Indicative date** |
| Tender | Issue of Invitation to Tender | 10 July 2023 |
| Clarification deadline | 24 July 2023 |
| Return Date | 30 July 2023 |
| Evaluation period starts | 3 August 2023 |
| Evaluation period ends | 14 August 2023 |
| Contract Award Report Approved | 21 August 2023 |
| Contract Award | Award Letter | 1 September 2023 |
| Contract Commences | 4 September 2023 |

**Table 1: Procurement Timetable**

# Nature of the Contract

3.1 IDS requires a Contractor to supply and install kitchens and bathrooms and ancillary works to their properties.

3.2 Where required by the specification the Contractor is required to obtain and pass on manufacturer’s warranties on materials/equipment replaced. These warranties shall be for a minimum of one year where available and cover all materials and labour involved. Such warranties will exclude:

* + 1. vandalism or malicious damage which will be subject to the instructions of the Contract Administrator (CA), will be paid by IDS.
    2. incorrect installation by the Contractor will be the responsibility of the Contractor.

#### The Contractor shall be deemed to have included for all obligations arising from the tender documentation within the pricing at Document 4. Specifically, these shall include but not be limited to:

* + 1. programming the works and obtaining access to the sites.

3.3.2 using every endeavour to ensure, where the quality of the works allow, to complete their task in accordance with the agreed programme.

3.3.3 providing all appropriately qualified labour, materials, plant and everything else necessary to complete the Contract.

3.3.4 all necessary pre-inspection of the site to ascertain the actual requirements/meaning of the Contract and obtain details/measurements as the Contractor deems appropriate.

3.3.5 removing all surplus materials, rubbish etc., arising from site. Ensure non-hazardous material is disposed of at a tip approved by a waste Regulation Authority. Remove all surplus hazardous materials and their containers regularly for disposal off site in a safe and competent manner as approved by waste regulation authority and in accordance with relevant regulations. Waste transfer documents shall be kept safe and produced when requested by CA. All charges for waste disposal shall be included with services and order costs (to the satisfaction of the CA and paying all tipping charges).

# **Tender Evaluation Process**

4.1 IDS requires the information sought in the Invitation to Tender (ITT) from tenderers.

4.2 Please do not include any information that is not expressly requested in the invitation to tender documentation, the ITT or subsequently in response to a clarification question. Do note that the inclusion of an executive summary, general marketing and company literature or a statement of reasons for award is not required and will not be considered in the evaluation of tenders.

4.3 Tender submissions must be in English.

4.4 Evaluations of tenders received will be based on the following two stages:

Stage 1: Completeness check

Stage 2: The Price/Technical Evaluation (This comprises of an evaluation of the submission relating to Price and the Tenderer’s Method Statements and will also include the Social Value scoring.

**4.5 Stage 1: Completeness Checks**

4.5.1 The tenderers responses for each area will be checked for completeness and compliance before responses are evaluated. Incomplete or non-compliant responses will be excluded from further consideration.

4.5.2 Tender submissions will be checked to establish that they have signed the Form of Tender and other relevant documents and pages which require signatures.

4.5.3 If the tender submission does not have a signature in the relevant documents or pages, IDS at its discretion, may write to the relevant supplier, and request signed documents to be submitted. The communication sent to the tenderer will state the deadline by which the signed documents should be submitted. Failure to meet those deadlines and the conditions set out in the communication issued by IDS will result in the tenderers submission being considered as non-compliant, and therefore it will be rejected.

4.5.4 Submissions that do not pass the completeness checks stage will be considered as non-compliant and will be disqualified or excluded from the evaluation process.

**4.6 Stage 2: Price / Technical Evaluation**

4.6.1 Tender submissions that have passed the completeness and selection assessments will be considered for evaluation in Stage 2.

4.6.2 Stage 2 assesses the merits of the tenders and the solutions being offered. IDS evaluation will be in accordance with the criteria in Table 2 for each Area.

|  |  |
| --- | --- |
| Criteria | Weighting (%) |
| Price | 40 |
| Method statements / Quality questions | 60 |
| Agreement to the Performance Management Regime | Pass / Fail |

Table 2 Price/Quality Ratio

**4.6.1 Price Evaluation**

4.6.1.1 Tenderers are reminded that prices should be exclusive of VAT and should not be qualified in any way.

4.6.1.2 The Pricing Schedule within Documents 4a and 4b Schedules of Rates shall be completed by the tenderer.

4.6.1.3 The Tender Sum for each tenderer will be evaluated by multiplying the lowest compliant Tender Sum by 40 and then dividing by their Tender Sum and then rounding the resulting figure to two decimal places.

40 x Lowest Technically Compliant Tender Sum

Tender Sum

4.6.1.4 An example of a Price evaluation is at Table 3.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Tenderer | A | B | C | D | E |
| Tender Sum | £4,500,555 | £5,685,921 | £4,876,946 | £6,025,347 | £5,239,719 |
| Weighted Score | 40 | 31.66 | 36.91 | 29.88 | 34.36 |

Table 3 Example Price Evaluation

4.6.1.5 All price submissions must be compliant with the specification and IDS reserves the right to reject any price submission that does not fully meet specification.

4.6.1.6 Any tender the cost of which is, save for arithmetical errors following preliminary evaluation by IDS, in the reasonable opinion of IDS unrealistically low, may be rejected.

**4.6.2 Evaluation of Responses to the Technical Questions**

4.6.2.1 The Tenderer is required to respond to the Technical Questions at Appendix A to this Document 2.

4.6.2.2 Under each quality question, there is a set of criteria identified that the evaluators will use to assess the response provided by the tenderer to that question.

4.6.2.3 Evaluators will award marks against tender submissions using the scoring rationale identified in Table 4.

| **Score** | **Acceptability** | **Participant response demonstrates** |
| --- | --- | --- |
| 0 | **No Response** (Unacceptable) | No response received  The response does not address the questions posed |
| 1 | **Weak**  (Serious Reservations) | A response which is unacceptable or contains shortcomings; e.g. shows very poor understanding of IDS objectives, provides insufficient or contradictory evidence for evaluation, does not address the stated requirements. Has insufficient evidence that the specified requirements can be met. Significant omissions. |
| 2 | **Poor**  (Minor Reservations) | A response which shows some understanding of the requirements but does not address key issues; e.g. proposals do not address all key criteria, shows only a basic understanding of the project requirements, evidence is vague, not enough evidence of experience in the relevant sector. Submission has some minor omissions against the specified requirements. Proposal achieves basic minimum standard in some respects but unsatisfactory in others. |
| 3 | **Acceptable**  (Meets expectations) | The information is wholly acceptable, and the information provided fulfils the normal requirement/expectation; e.g. proposals demonstrate clear understanding of IDS requirements, clear evidence of understanding and the proposal is acceptable. |
| 4 | **Good**  (Above Expectations) | The information exceeds normal expectations. The proposal submitted provides good evidence that the specified requirements can be met. Full and robust responses. |
| 5 | **Excellent** (Outstanding) | The information is exceptional or exemplary in relation to the Criterion being scored; e.g. proposals consistently going beyond the needs of the project, evidence of understanding clear and consistent throughout the proposal. Proposal submitted provides strong evidence that the specified requirements can be met. Added value is demonstrated. |

Table 4 Evaluation Scoring

4.6.2.4 Following the initial scoring, the scores will be moderated by those scoring to arrive at an agreed moderated score for each question and consequently an agreed total moderated score. Tenderers will be expected to achieve a minimum quality threshold of at least 2 (two) out of 5 (five) for all the Method Statement Questions following moderation in order to be considered for contract award. A moderated score of 0 or 1 for any question will disqualify a tenderer from being awarded a contract.

4.6.2.5 Tenderers should ensure that the requirements set out in the Tender Specification are incorporated within their method statements. IDS reserves the right to give lower marks to any method statements that fail to address the outcomes sought in the Specifications or the Question asked.

4.6.2.6 To establish the final score against each quality question, the points awarded following moderation (i.e. 0 - 5) will be multiplied by the respective weighting factor against each question to arrive at a weighted score. The total weighted score will then be multiplied by 60 and divided by the highest weighted score to reach the total quality score for each tenderer.

60 x Tender Technical Score

Highest Technical Score

4.6.2.7 Example of moderated quality response score are in Tables 5.

|  |  |  |  |
| --- | --- | --- | --- |
| Tender A | Weighting | Moderated Score | Weighted Score |
| 1 | 35 | 4 | 140 |
| 2 | 35 | 3 | 105 |
| 3 | 15 | 3 | 45 |
| 4 | 15 | 4 | 60 |
|  | 100 |  | 350 |

|  |  |  |  |
| --- | --- | --- | --- |
| Tender B | Weighting | Moderated Score | Weighted Score |
| 1 | 35 | 2 | 70 |
| 2 | 35 | 4 | 140 |
| 3 | 15 | 3 | 45 |
| 4 | 15 | 4 | 60 |
|  | 100 |  | 315 |

|  |  |  |  |
| --- | --- | --- | --- |
| Tender C | Weighting | Moderated Score | Weighted Score |
| 1 | 35 | 4 | 140 |
| 2 | 35 | 4 | 140 |
| 3 | 15 | 5 | 75 |
| 4 | 15 | 4 | 60 |
|  | 100 |  | 415 |

|  |  |  |  |
| --- | --- | --- | --- |
| Tender D | Weighting | Moderated Score | Weighted Score |
| 1 | 35 | 3 | 105 |
| 2 | 35 | 3 | 105 |
| 3 | 15 | 4 | 60 |
| 4 | 15 | 2 | 30 |
|  | 100 |  | 300 |

|  |  |  |  |
| --- | --- | --- | --- |
| Tender E | Weighting | Moderated Score | Weighted Score |
| 1 | 35 | 4 | 140 |
| 2 | 35 | 5 | 175 |
| 3 | 15 | 3 | 45 |
| 4 | 15 | 3 | 45 |
|  | 100 |  | 405 |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Tenderer** | **A** | **B** | **C** | **D** | **E** |
| **Quality Score** | 350 | 315 | 415 | 300 | 405 |
| **Weighted Score** | 50.6 | 45.5 | 60.0 | 43.4 | 58.6 |

Tables 5

**4.6.3** **Price / Technical Evaluation Completion**

4.6.3.1 Following the completion of the 3rd stage evaluation, the weighted technical and price scores are added together. Using the scored examples at 4.6.1 and 4.6.2 in Table 6.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Tenderer** | **A** | **B** | **C** | **D** | **E** |
| **Weighted Price Score** | 40 | 31.66 | 36.91 | 29.88 | 34.36 |
| **Weighted Quality Score** | 50.6 | 45.5 | 60.0 | 43.4 | 58.6 |
| **Total Weighted Score** | 90.6 | 77.2 | 96.9 | 73.3 | 92.9 |

Table 6

# Notices

5.1 No work of any kind shall be undertaken before receipt of IDS award of a Contract to commence the work.

5.2 The Tender shall remain open without adjustment to price for acceptance by IDS for a period of six calendar months following the date for submission of the Tender. Where Tenderers advise IDS that they are unable to submit their tenders by the due date IDS may at its discretion substitute a new date for submission of tenders and shall notify all tenderers accordingly.

5.3 The tender shall include the cost of employing operatives as set out below:

* + 1. Payments to operatives in accordance with the London Living Wage.

5.3.2 All costs and expenses incurred in connection with payments made in respect of National Insurance, the National Insurance Industrial Injuries, Redundancy Payments, Graduated Pension Schemes or any cost and expenses associated with any Act of Parliament for the time being dealing with such matters.

* + 1. The full costs of providing the Service during all times that IDS is open for business and during the hours prescribed.

1. **Price Adjustment**

6.1 On the anniversary of the date of commencement of the contract and each subsequent anniversary, all rates contained in Documents 4a and 4b shall be adjusted by reference to the Department of Business, Energy and Industrial Strategy (BEIS) Building Materials and Construction Statistics Table 1 Construction Material Price Indices c) Repairs and Maintenance.

* 1. The formula to be applied is anniversary indices – base date indices x 100 x 0.7

base date

Example base date December 2020 and anniversary December 2021

144.5 - 116 x 100 x 0.7 = 17.2% increase to the rates

116

* 1. The ‘Base Month’ for the calculation shall be 1 September 2023.

# **APPENDIX A**

**Technical Questions**

The tenderer is required to respond to the technical questions below:

|  |  |  |
| --- | --- | --- |
|  |  | **Weighting** |
| 1 | **Mobilisation**  Taking into account the requirements for this contract, bidders are required to detail their approach working in collaboration with IDS to develop and deliver the contract. Your response should specifically include:   * Your approach and methodology for establishing effective programmes in year 1 and any subsequent years. * How you will establish works for each estate and the attached property list? * How you will work to maximise collaboration with IDS to provide added value to the contract?   **(Maximum 1500 words for Q1 – approx. 2 pages of A4)** | 35 |
| 2 | **Delivery**  To ensure a fully collaborative relationship with contractors we anticipate a focus on direct workforce for delivery of this contract.   * Please provide details of your proposed management structure, including identifying those team members who will oversee mobilisation and those who will be responsible for delivery stages of the project. * Provide a breakdown of your direct workforce to Subcontractor split for delivering this project. * Where necessary, please provide you approach to managing subcontractors.   **(Maximum1500 words for Q2 – approx. 2 pages of A4)** | 35 |
| 3 | **Resident Liaison**  Please detail your approach to liaising with residents before, during and after works. Your response should include:   * Resources provided to support residents. * How you will communicate with residents * How you will tailor services to meet individual resident’s needs (e.g. elderly, disabled, non-English speaking, etc.)   **(Maximum 1000 words for Q3 – approx. 1.5 pages of A4)** | 15 |
| 4 | **Social Value**  IDS are committed to delivering opportunities for our residents in line with the recommendations of the Public Services (Social Value) Act 2012.  Please detail your proposed social value offers for this contract.  Your response should include:   * Person responsible for ensuring Social Value Commitments are delivered. * Approach to delivering each proposed measure. * How you will report on Social Value delivered on the contract.   **(Maximum 1000 words for Q4 – approx. 1.5 pages of A4)** | 15 |
|  | Total | 100 |
| 5 | The tenderer is required to clearly state that the performance management regime covered within the Key Performance Indictor document is entirely accepted | Pass/Fail |