

**Minerva Learning Trust**

**Project Management, Design and Advice Contract**

**MLT-047**

Please complete the attached form. Please note that the PQQ (Pre-Qualification Questionnaires) should also have been completed, any requirement for additional documentation should be sent to procurement@minervalearningtrust.co.uk. Please always specify in your communication the above reference.

Contents

[About our trust 2](#_Toc82774992)

[Scope 3](#_Toc82774993)

[About the tender process 4](#_Toc82774994)

[Tender Timetable 5](#_Toc82774995)

[Phase 1 Documentation Required 5](#_Toc82774996)

[Evaluation Criteria 6](#_Toc82774997)

[Phase 2 Bid Responses 7](#_Toc82774998)

[Customer Requirements Questions 8](#_Toc82774999)

[Phase 3 14](#_Toc82775000)

[Form of Tender 15](#_Toc82775001)

[Declaration of Bona Fide Tender 16](#_Toc82775002)

# About our trust

The Minerva Learning Trust was established in October 2014. Our vision is to provide outstanding education for pupils who are from a wide variety of backgrounds across the city of Sheffield. During 2017-18 the trust brought together four secondary schools to create a new partnership which will support the teaching and learning of around 5,000 pupils. We resolutely believe that we are stronger together and that each school within the MAT (Multi Academy Trusts) has individual strengths and we celebrate the diverse and unique qualities of each school. Our aim is for all schools within the Trust to become ‘Outstanding.’

The Trust ethos is one of collegiality which whole heartedly places pupils at the centre of the work we do. We are a recognised Academy Sponsor and consequently will engage with schools in difficulty giving the necessary level of support to bring about school improvement.

Our procurement strategy stipulates the following and suppliers will be expected in the tender documentation to evidence supporting these values: -

1. Ensure procurement supports the education and development of our pupils
2. Achieve value for money and economies of scale and terms that are favourable but maintain the quality standards
3. Source locally where feasible and within the requirements
4. Procure in a sustainable way given due consideration to the environment, social and economic factors
5. Equality and transparency of procurement procedures
6. Professional conduct during procurement activities should reflect the Trust’s Code of conduct.

# Scope

Minerva Learning Trust is looking to appoint a Project Management led multi-disciplinary professional services team to undertake construction and property related services including: - Project Management, Cost Management, Technical Design and Health & Safety Services top respond to the Trust’s programme of Capital works.

The contractors will provide a full project management and design team service to progress through the RIBA Plan of Work 2019

The project management led multi-disciplined team will consist of the following disciplines: -

|  |
| --- |
| Project Management Lead Consultant |
| Cost Management |
| Architectural Design Services |
| Mechanical & Electrical Design Services |
| Structural Design Services (inc. Civil and Construction Design) |
| BREEAM Assessor |
| Building Surveyor |
| CDM Co-Ordinator |

Minerva Learning Trust will enter into contract with the lead consultant on a direct award call off basis to carry out specific projects on a whole team or part team basis for each individual project which will be subject to specific agreements and formal orders.

The terms and conditions of the contractual arrangements between Minerva Learning Trust and the Project Management organisation will be the JCT Measured Term Contract 2016

The annual budget for capital works is estimated at £750k per annum excluding any potential other capital grants received for other large-scale projects

# About the tender process

The objective of this tender is to identify the most economically advantageous tender offer.   The criteria by which this tender will be evaluated are detailed within this document.

Please ensure that all documents required are submitted and that all questions are completed in full, and in the format requested, failure to do so may result in your submission being disqualified. If the question does not apply to you, please state clearly ‘N/A.’

This is a 3 phase tenders as follows:-

|  |  |
| --- | --- |
| Phase 1 | Pre-Qualification Questionnaire and Documentation (Pass / Fail) |
| Phase 2 | Bid Submission Evaluation |
| Phase 3 | 3 Most Economically Advantageous Bids to present to Tender Team |

**All enquiries relating to this Tender must be forwarded in writing via email to procurement@minervalearningtrust.co.uk**

Telephone enquiries to 0114 2838438 or 07309676332

Please note that responses to any queries or clarification requests maybe circulated to all Tenderers.

Minerva Learning Trust reserves the right to issue supplementary documentation at any time during the tendering process to clarify any issue or amend any aspect of the ITT (INVITATION TO TENDER).

The trust reserves the right to cancel the tender process at any point. The trust is not liable for any costs resulting from any cancellation of this tender process nor for any other costs incurred by those tendering for this Contract.

The contract with the successful tenderer is intended to commence on **January 2021** and will be awarded for an initial period of 3 years with the option to extend a further 2 years

**Tenders must be returned via email to procurement@minervalearningtrust.co.uk**

**Tenders must reach us by 20th October 2021. Late tender bids will not be considered. Failure to use the tender documents will invalidate the tender.** We reserve the right, both prior to and after the award of the tender, to inspect the validity of all information given, to substantiate the information detailed by a supplier.

Tenders will be assessed in strict accordance with the award criteria stated.

Tenders must be valid for acceptance for a minimum of 90 days from the tender closing date.

# Tender Timetable

|  |  |
| --- | --- |
| ITT Advertised via Contract finder | 20th September 2021 |
| Last date for clarifications | 13th October 2021 |
| **Tender closing date 12 noon** | 20th October 2021 |
| Tender opening and assessment | 21st October 2021 |
| Presentations | 3rd November 2021 |
| Award contract | 5th November 2021 |
| Cooling off period | 10 days |
| Implementation meetings commence | TBC |
| Contract start date | 1st January 2022 |

**Dates may be subject to change.**

# Phase 1 Documentation Required

|  |  |
| --- | --- |
| Document | Required |
| [Pre-Qualification Questionnaire](https://forms.office.com/Pages/ResponsePage.aspx?id=SskizAXdVEW0rNKHneOOtLu-_g8wjrdKp862gj83JqhUMzdKT1VWSUJJNlU4WUFVSTBYTFdZV1RFQiQlQCN0PWcu) – Mandatory completion | Yes |
| ISO or British Standards Accreditation Evidence | Yes |
| Relevant Registration Certificates (RIBA etc) | Yes |
| Organisation Structure (Hierarchy Chart) | Yes |
| Code of Conduct | Yes |
| Environmental / Sustainability Policy | Yes |
| Ethics /Anti Bribery / Corruption Policies processes if not part of code of conduct | Yes |
| Statement of Assurances (Copy is part of the bid pack) | Yes |

# Evaluation Criteria

Minerva Learning Trust intend to assess the eligible tender responses using the criteria below:

|  |  |  |  |
| --- | --- | --- | --- |
| Overall Award Criteria | Criteria Weighting | Sub Criteria | Weighting |
| Commercial (Pricing) | 50% | Contract Price % Fee | 50% |
| Quality | 30% | Service Delivery | 5% |
| Contract Management | 20% |
| Technical Ability | 5% |
| Sustainability | 20% | Environmental Policies | 10% |
| Ethical Policies | 10% |

Other Tools

* + Credit Checks (Verifies financial standing and company governance.

# Phase 2 Bid Responses

**Commercial (50%)**

**SUPPLIER NAME XXXXX**

Pricing will be assessed in the following way.

(Lowest Total Cost / Cost to be Scored) x % Weighting = Final Score

Please provide the fixed fee or percentage fee you apply to carry out your services on projects of the following values

(The percentage fee will be applied to the higher value for comparisons to the fixed fee bids)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Item | Project Value | Weighting | Fixed Fee | Percentage Fee |
| 1 | £0 - £100,000 | 5% | £ | % |
| 2 | £100,001k - £200,000 | 10% | £ | % |
| 3 | £200,001k - £300,000 | 5% | £ | % |
| 4 | £300,001 - £400,000 | 5% | £ | % |
| 5 | £400,001 - £500,000 | 5% | £ | % |
| 6 | £500,001 - £1,000,000 | 5% | £ | % |
| 7 | £1,000,001 - £5,000,000 | 10% | £ | % |
| 8 | £5,000,000 + | 5% | £ | % |

Please note that these rates will form part of the contract with the winning supplier and will be fixed for the initial 3 years of the contract. If the contract is extended to year 4 and 5 then at that stage, there will be a renegotiation on the prices.

# Customer Requirements Questions

Please complete the following questions. Scores will be allocated for each question as per the criteria below. Each question is weighted. Some questions will be Yes or No answers.

|  |  |
| --- | --- |
| **Score** | **Criteria for awarding score** |
| 0 | Major Concerns.  The tenderer has failed to address the questions submitted, a nil response or any element of the responses gives a cause for major concern that the requirements will not be met |
| 1 | Unsatisfactory.  The Tenderer has provided a minimal response addressing some of the requirement with very little detail. The response provided does not provide full confidence that the requirements can be met. |
| 2 | Acceptable.  The Tenderer has provided an acceptable response addressing some of the requirement with partial detail. There are a few concerns about whether the requirements can be met, which requires further clarification |
| 3 | Satisfactory.  The Tenderer has provided a satisfactory response addressing most of the requirements in sufficient detail, providing confidence that most requirements can be met |
| 4 | Good.  The Tenderer has provided a strong response addressing most of the requirements in detail, providing confidence that the requirements can be met in full. |
| 5 | Excellent.  The Tenderer has provided a thorough response, addressing ALL requirements in extensive detail, providing confidence that the requirements can be met in full, with added value solutions. |

Please complete the questions below please try to keep to the maximum word count for each answer

**Service Delivery 5% (Supplier Response Required)**

**(2000 Words)**

**How will you ensure that your procurement of contractors and sub-contractors to carry out the works will align with our procurement strategy values (Page 2)**

**TYPE HERE**

**Contract Management 20% (Supplier Response Required)**

**(3000 Words)**

**Please explain how the contract will be managed.**

**Preparation, Staff Management (inc. Supply Chains and Subcontractors), Communications, Contract Reviews and Business Continuity.**

**What KPI’s if any would you put on contactors regards the deliverables e.g., penalties for late contract completions.**

**TYPE HERE**

**Technical Capability 5% (Supplier Response Required)**

**(1000 Words)**

**What qualifications and registered bodies are your company and staff affiliated to relevant to this contract.**

**Do you have ISO accreditation or conform to and other professional body.**

**TYPE HERE**

**Sustainability (Environment) 10% (Supplier Response Required)**

**(1000 words)**

**Please demonstrate how your organization will ensure commitment to environmental management considerations and compliance with all statutory environmental obligations in the delivery of this contract. Your response should include:**

* **Initiatives you intend to employ to minimize or reduce adverse environmental impact incurred in delivery of this contract, including the scheduling of site visits to reduce carbon in transportation.**
* **Your organization's internal policies, processes, and procedures in relation to environmental management including how they are regularly monitored and updated.**
* **How you will ensure that these expectations are monitored in the supply chains.**
* **Staff awareness and training.**

**TYPE HERE**

**Sustainability (Ethics) 10% (Supplier Response Required)**

**(1000 Words)**

**Please describe any initiatives that you will employ or policies you have in place to address ethical issues such as, human rights and modern slavery (especially in your supply chains). Do you have a Code of Conduct, Anti Bribery and Fraud policies.**

**What social values does your organization have and how do you demonstrate or act upon them.**

**TYPE HERE**

# Phase 3

**References**

Minerva Learning trust reserves the right to take up references with those identified in the PQQ. This will normally be carried out with the 3 highest scoring suppliers.

The standard questions we will ask references in relation to contract performance are as follows: -

1. Quality of Service
   1. The overall service, turning up as scheduled, behaviors around site, follow site guidelines (Uniform/ID/DBS checks)
   2. Dealing with contractors
2. Technical
   1. Completion of necessary documentation and technical support
3. Contract Management
   1. Handling of issues and queries

Scoring given by the references

1- Poor

2-Average

3-Good

4- Excellent

However, these questions are subject to change and may differ contract to contract.

**Presentations**

The 3 best bids will be invited to present to the project team, the theme of this will be shared with the 3 suppliers prior to the presentation date.

**Form of Tender (MUST BE SIGNED)**

To: **Minerva Learning Trust**

Dear Sir / Madam

1. I/we have read the information provided in your TENDER and, subject to and upon the terms and conditions contained therein, I/we offer to supply the services described in the said TENDER documents in such manner as may be required.

2. Terms and Conditions: I/we agree that this TENDER and any contract which may result there from shall be based upon those included in the TENDER Pack.

3. The prices quoted in this TENDER are valid for acceptance for 90 days from the final day for submission of Quotes and I/we confirm that the terms of the quotation will remain binding upon me/us and may be accepted by you at any time before that date.

4. Law: I/we agree that the construction, validity, performance and execution of any contract that may result from this TENDER shall be governed by and interpreted in accordance with English Law and shall be subject to the exclusive jurisdiction of the Courts of England and Wales.

5. I/we agree to bear all costs incurred by me/us in connection with the preparation and submission of this TENDER and to bear any further costs incurred by me/us prior to the award of any contract.

6. I/we agree that any other terms or conditions of the agreement or any general reservation which may be printed on any correspondence emanating from me/us in connection with this TENDER, shall not be applicable to this Contract.

|  |  |
| --- | --- |
| Signature: |  |
| Print Full Name: |  |
| Date: |  |
| In the capacity of:  *(Please state official position, eg. Director, Sales Manager, etc.)* |  |
| being a person duly authorised to sign tenders on behalf of: | |
| Company Name: |  |
| Address: |  |

**Declaration of Bona Fide Tender (MUST BE SIGNED)**

1. We certify that this is a bona fide quotation, and that we have not fixed or adjusted the amount of the quotation by or under or in accordance with any agreement or arrangement with any other person. We also certify that we have not done and we undertake that we will not do at any time before the hour and date specified for the return of this quotation any of the following acts:

a)  Communicate to a person other than the person calling for those quotes the amount or approximate amount of the proposed quote, except where the disclosure, in confidence, of the approximate amount of the quote was necessary to obtain insurance premium quotations required for the preparation of the quotation.

b)  Enter into any agreement or arrangement with any other person that they shall refrain from quoting or as to the amount of any quotation to be submitted.

c)  Offer or pay or give or agree to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to any other quote or proposed quotation for the said work any act or thing of the sort described above.

2.  We further certify that the principles described in paragraph 1 above have been, or will be, brought to the attention of all sub-contractors, suppliers and associate companies providing services or materials connected with the quotation, and any contract entered into with the sub-contractors, suppliers or associated companies will be made on the basis of compliance with the above principles by all parties.

3.  In this certificate, the word “person” includes any persons and any body or association, corporate or otherwise; and “any agreement or arrangement” includes any such transaction, formal or informal, and whether legally binding or not.

4.  I confirm that I accept any breach of the conditions of this Declaration of Bona Fide Quotation will inevitably lead to the termination of the agreement by Minerva Learning Trust

|  |  |
| --- | --- |
| Signature: |  |
| Print Full Name: |  |
| Date: |  |
| In the capacity of: *(Please state official position, eg. Director, Sales Manager, etc.)* |  |
| being a person duly authorised to sign tenders on behalf of: | |
| Company Name: |  |
| Address: |  |