



Crown
Commercial
Service

PRICE MODEL AND PRICE EVALUATION GUIDANCE
PROJECT MANAGEMENT AND FULL DESIGN TEAM SERVICES

REFERENCE NUMBER

RM 3741

ATTACHMENT 18

These instructions are set out as follows:-

- Introduction to Price Model Workbooks
- Instructions for Completion – Price Model Workbook (Part 1 Project Fee Percentages)
- Instructions for Completion – Price Model Workbook (Part 2 Time Charge Fees)
- Instructions for Completion – Price Model Workbook (Part 3 Regional Variations)
- Price Evaluation Process
- ANNEX A – Disciplines & Services
- ANNEX B – Evaluation Weightings

These instructions are applicable for all six (6) Lots for the Project Management and Full Design Team Services (PMFDTS) Framework.

Potential Providers 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 Potential Providers submitting a Tender for one or more Lots either in their own name or as part of a Group of Economic Operators.

INTRODUCTION TO PRICE MODEL WORKBOOKS

1. Introduction

- 1.1. These instructions are provided to assist all Potential Providers in the completion of the Price Model workbooks. Potential Providers shall also ensure that they comply with any instruction contained within the individual Price Model workbooks.

2. Overall Approach

- 2.1. Potential Providers are required to submit pricing for Percentage Project Fees and Time Charge Fees within the Price Model workbooks for each Lot for which they are submitting a Tender.
- 2.2. Each Lot comprises of one or more Core Service Disciplines. The Potential Provider shall complete all necessary cells in the workbooks for each of the Core Service Disciplines applicable to that Lot for which it is submitting a Tender. Any Potential Provider who fails to fully complete each of the Price Model workbooks for each applicable Lot, for which it is submitting a Tender, may be excluded from further participation in this Procurement.
- 2.3. The groupings of Core Service Disciplines by Lot are provided in paragraph 3 below. The Prices submitted by the Potential Provider within each completed Price Model workbook will be evaluated in accordance with the groupings of Core Service Disciplines relevant to that Lot. A weighting will be applied to the Prices submitted as set out in each Price Model workbook.

3. Groupings

- 3.1. Potential Providers shall note that Core Service Disciplines are grouped together for pricing purposes. The Potential Provider shall refer to Attachment 9 – Framework Schedule 2: Services and Key Performance Indicators and Attachment 9a – Annex A – Schedule of Services, where the full scope of Services for each Core Service Discipline is described.
- 3.2. Where Core Service Disciplines are grouped together, the Potential Provider shall submit a single Price to provide the Service. For example, Lot 2 – Project Management comprises three (3) separately defined Core Service Disciplines and Schedule of Service i.e. Project Lead, Client Adviser and Contract Administrator. The Potential Provider shall provide a Price for undertaking all of the required Services for the grouped Core Service Disciplines.
- 3.3. The table below sets out the groupings of Core Service Disciplines by Lot.

Lot Description/Discipline	Price Model workbooks to be completed
Lot 1 – Project Management & Full Design Team Services	
<ul style="list-style-type: none">• Project Lead• Client Adviser• Contract Administrator• Cost Consultant• Architect• Lead Designer• Civil and Structural Engineer• Building Services Engineer• Principal Designer	<ul style="list-style-type: none">• 10a – Architect (Lot 1)• 10b - BIM Co-ordinator (Lot 1)• 10c - BIM Information Manager (Lot 1)• 10d - Building Services Engineer (Lot 1)• 10e - Civil and Structural Engineer (Lot 1)• 10f - Cost Consultant (Lot 1)• 10g - Lead Designer (Lot 1)

Lot Description/Discipline	Price Model workbooks to be completed
<ul style="list-style-type: none"> BIM Information Manager BIM Co-Ordinator 	<ul style="list-style-type: none"> 10h - Principal Designer (Lot 1) 10i - Project Management (Lot 1)
Lot 2 – Project Management Services	
<ul style="list-style-type: none"> Project Lead Client Adviser Contract Administrator 	<ul style="list-style-type: none"> 11 - Project Management (Lot 2)
Lot 3 – Architectural and Design Team Services	
<ul style="list-style-type: none"> Architect Lead Designer Principal Designer BIM Information Manager BIM Co-Ordinator 	<ul style="list-style-type: none"> 12a - Architect (Lot 3) 12b - BIM Co-ordinator (Lot 3) 12c - BIM Information Manager (Lot 3) 12d - Lead Designer (Lot 3) 12e - Principal Designer (Lot 3)
Lot 4 – Cost Management Services	
<ul style="list-style-type: none"> Cost Consultant (Quantity Surveyor) 	<ul style="list-style-type: none"> 13 - Cost Consultant (Lot 4)
Lot 5 – Civil and Structural Engineering Services	
<ul style="list-style-type: none"> Civil and Structural Engineer BIM Information Manager BIM Co-Ordinator 	<ul style="list-style-type: none"> 14a - BIM Co-ordinator (Lot 5) 14b - BIM Information Manager (Lot 5) 14c - Civil and Structural Engineer (Lot 5)
Lot 6 – Building Services Engineering	
<ul style="list-style-type: none"> Building Services Engineer BIM Information Manager BIM Co-Ordinator 	<ul style="list-style-type: none"> 15a - BIM Co-ordinator (Lot 6) 15b - BIM Information Manager (Lot 6) 15c – Building Services Engineer (Lot 6)

4. The Price Model Workbook

- 4.1. A separate Price Model workbook is provided for each Core Service Discipline (in Microsoft Excel format). The Core Service Disciplines are listed within Annex A of this document.
- 4.2. The Potential Provider shall refer to the table at paragraph 3.3 above, to determine the relevant Price Model workbook(s) applicable to the Lot for which it is submitting a Tender.
- 4.3. Each Price Model workbook contains seven (7) worksheets, which are described in the table below:-

Tab	Worksheet Title	Description
1	Title Page	The title page indicating the Core Service Discipline(s) included in the workbook.

Tab	Worksheet Title	Description
		Potential Providers shall insert their company name here.
2	Part 1: Percentage Project Fees	<p>Potential Providers shall fully complete each table (i.e. Design & Build Single Stage) for all Procurement Types, of which each is broken down by project value band and RIBA Plan of Work Stage.</p> <p>Potential Providers shall submit a Price for each value band and RIBA Plan of Work Stage for each Procurement Type.</p> <p>Potential Providers shall submit an adjustment(s) for 'Project Complexity'.</p>
3	Part 2: Time Charge Fees	Potential Providers shall fully complete the Price Model worksheet for hourly and daily rates for each 'Grade' for each Core Service Discipline.
4	Part 3: Regional Variations	Potential Providers shall fully complete the Price Model worksheet for regional variations for the six (6) regions of the UK detailed therein in respect of the Percentage Project Fees and Time Charge Fees.
5	Part 4: Time Charge Fees Summary	This worksheet brings forward the submitted Price from Part 2: Time Charge Fees and will automatically populate a weighted table which calculates an average hourly and average daily rate for evaluation purposes. Potential Providers do not complete this worksheet.
6	Part 5: % Project Fees Summary	This worksheet brings forward the submitted Price from Part 1: Percentage Project Fees and will automatically populate a weighted table which calculates average percentage fees for each Procurement Type. Potential Providers do not complete this worksheet.
7	Part 6: Tender Summary	This worksheet brings forward both the Percentage Project Fees Summary worksheet and the Time Charge Fees Summary worksheet. These figures will be extracted and evaluated. Potential Providers do not complete this worksheet.

- 4.4. Potential Providers must complete the applicable Price Model workbook(s) for the Core Service Disciplines, which are aligned to the Service requirements described in the Schedule of Services document (Attachment 9a). Core Service Disciplines which will be priced at Call Off stage, if required, are described in Annex A – Schedule of Services (Attachment 9a) and highlighted in **red text** for each Core Service Discipline. This applies to each Lot for which Potential Providers are submitting a Tender.
- 4.5. Potential Providers who are submitting a Tender for more than one Lot (where the same Core Service Discipline is in both Lots), **must** complete the relevant Price Model workbook for each Lot for which they are submitting a Tender. A Price Model workbook is provided for each applicable Core Service Discipline in the six (6) Lots.

- 4.6. If a fully completed Price Model workbook is not submitted by the Potential Provider for each Lot for which the Potential Provider has submitted a Tender, this may be deemed a non-compliant bid for the Lot in question. The Potential Provider may be excluded from further participation in this Procurement for that Lot.
- 4.7. Potential Providers must upload the fully completed Price Model workbook(s) applicable to each Lot for which they are submitting a Tender into the e-Sourcing Suite in accordance with paragraph 12.5.4 of the Invitation to Tender (Attachment 1).
- 4.8. The Prices submitted in the Price Model workbook(s) shall include the following: -
 - 4.8.1. all travel expenses and subsistence;
 - 4.8.2. the provision of technical staff and staff engaged in secretarial, accountancy, administrative or other supporting duties including basic salary, any additional payments or benefits and social costs such as insurances or pension payments;
 - 4.8.3. overheads and profit, office expenses (including rental and heating), non-recoverable staff-time and administrative staff who are not chargeable;
 - 4.8.4. postage, delivery of documents, telephone calls and similar incidental expenses;
 - 4.8.5. all necessary disbursements, including reasonable number of paper copies of all reports and drawings for statutory approvals, tender purposes, contract documentation, contract requirements, the Authority's records and circulation to other disciplines within the Potential Provider team; and
 - 4.8.6. the Management Charge of the Authority as defined within Schedule 1: Definitions of the Framework Agreement.

5. Abnormally Low Tenders

- 5.1. Potential Providers are advised that the Authority will scrutinise any Tender that contains a rate or price which appears abnormally low. Potential Providers' attention is drawn to the requirements of Regulation 69 of the Public Contract Regulations 2015 which permit the Authority to disregard or reject any Tender that is considered abnormally low. Potential Providers shall also note paragraph 12.6 of Invitation to Tender (Attachment 1).
- 5.2. Any Potential Provider who submits a Tender price which is 30% or more below the median of all other Potential Providers' tendered Price, may be challenged by the Authority for that particular Procurement Type (Percentage Project Fees) or grades (Time Charge Fees) as it may be deemed to be abnormally low.
- 5.3. For **Percentage Project Fees**, the median threshold will be applied to the aggregated 'Average Fee Percentage' of each Procurement Type for each Core Service Discipline.
- 5.4. For **Time Charge Fees**, the median threshold will be applied to the separate aggregated 'Average Region Adjusted Values' of Hourly and Daily rates.
- 5.5. **For the avoidance of doubt Potential Providers shall note that any bids 30% or more below the median threshold (Percentage Project Fee (by Procurement Type) and/or total Time Charge Fee (by Hourly and Daily rates)), may be challenged by the Authority under Regulation 69 of the Public Contract Regulations 2015.**

INSTRUCTIONS FOR COMPLETION - PRICE MODEL WORKBOOK (PART 1 PERCENTAGE PROJECT FEES)

6 Introduction

- 6.1 Potential Providers shall submit fee percentages in the required format in the tables at **Part 1: Percentage Project Fees**. Potential Providers shall note that only percentage values can be inserted into the tables. There is no opportunity to insert financial values.
- 6.2 **Potential Providers shall insert a percentage fee (up to 3 decimal points only) for each stage of the RIBA Plan of Work and for each Project Value band for each Procurement Type.**
- 6.3 Potential Providers shall only submit percentage fees in cells coloured **red** or **yellow**. All other cells will be locked. Potential Providers shall complete all **red** coloured cells, which will then turn **yellow**. Any cells remaining highlighted **red** indicates an erroneous amount has been entered into a field which should be completed.
- 6.4 Potential Providers shall ensure that the Percentage Project Fees include the full scope of Services and tasks set out within **Framework Schedule 2 Annex A: Schedule of Services** and shall include for all disciplines in Annex A of this document for the Lot(s) for which the Potential Provider is submitting a Tender.
- 6.5 The cells requiring completion by the Potential Provider in the Percentage Project Fees tables are coloured **red**. The entry into each cell must be greater than 0.001%. Any Potential Provider who fails to comply with this requirement is deemed to have submitted a non-compliant Tender and may be excluded from further participation in this Procurement.
- 6.6 The percentage fee submitted for each stage shall reflect the Services to be completed in accordance with the scope of Services for that stage. Potential Providers shall note that the percentage fee entered for each individual stage is specific to that stage. The 'Total Fee' column auto-calculates the sum of all of the percentage fees inserted for each stage. Potential Providers are not required to insert a percentage fee into the 'Total Fee' column.
- 6.7 A table is provided for each Procurement Type. Each table is identical in respect of Project Value band and the RIBA Plan of Work Stage. Potential Providers shall note that they are able to tailor their Price submission to each of the different Procurement Types .
- 6.8 For each Core Service Discipline Potential Providers shall submit a percentage fee in respect of each value band and RIBA Plan of Work Stage in each Procurement Type as follows:-
- 6.8.1 Design & Build (Single Stage);
 - 6.8.2 Design & Build (Two Stage);
 - 6.8.3 Traditional;
 - 6.8.4 Two Stage Open Book;
 - 6.8.5 Cost Led Procurement;
 - 6.8.6 Integrated Project Insurance.
- 6.9 Potential Providers shall submit their percentage fees based on the Total Project Value for the Lot(s) for which the Potential Provider is submitting a Tender.

- 6.10 Where relevant the Potential Provider's Tendered Price shall include any Civil and Structural Engineer and Building Services Engineer fees, who will need to make an assessment regarding the extent of engineering Services making up the overall Total Project Value. This only applies to Lots 1, 5 and 6.
- 6.11 For the purposes of fee calculations the Total Project Value shall be the estimated construction cost, exclusive of VAT, consultant fees, insurances, loose equipment, IT and furniture.
- 6.12 Potential Providers shall submit their **maximum** Percentage Project Fees in the worksheet, representing the maximum price for undertaking the required Services. These Prices will form part of Framework Schedule 3: Framework Prices and Charging Structure and will be the maximum Framework Prices; however, Potential Providers may offer discounts under a Call Off Procedure post Framework Award.
- 6.13 Potential Providers should complete the worksheets on the basis of being appointed on a single Core Service Discipline basis. Potential Providers may offer discounts under a Call Off Procedure should a Contracting Authority require more than one Core Service Discipline. Services described in Framework Schedule 2 – Services and Key Performance Indicators – Annex A: Schedule of Services.

7 Completion of Worksheets for BIM Information Manager and BIM Co-Ordinator

- 7.1 The Potential Providers' particular attention is drawn to the roles of BIM Information Manager and BIM Co-Ordinator. The full scope of Services for both the BIM Information Manager and BIM Co-Ordinator are set out at **Framework Schedule 2: Services and Key Performance Indicators** and **Annex A – Schedule of Services**.
- 7.2 For both Core Service Disciplines, the scope of Services for the following Procurement Types will be limited to RIBA Plan of Work Stages 1-3 as the Contractor will fulfil these roles for RIBA Plan of Work Stage 4 to Stage 6 for the following Procurement Types:
 - 7.2.1 Design & Build (Single Stage);
 - 7.2.2 Design & Build (Two Stage);
 - 7.2.3 Two Stage Open Book;
 - 7.2.4 Cost Led Procurement;
 - 7.2.5 Integrated Project Insurance.
- 7.3 However, the Potential Provider will be required to monitor Stage 4 to Stage 6 inclusive for the Procurement Types noted above, on behalf of the Contracting Authority.
- 7.4 In respect of the Traditional Procurement Type, the Potential Provider shall provide the full scope of Services for the role of BIM Information Manager and BIM Co-Ordinator for all RIBA Plan of Work Stages.

8 Project Complexity

- 8.1 Each project to which the Call Off Agreement relates will vary in complexity based on the type and nature of the project. The complexity of projects is categorised as LOW, MEDIUM and HIGH as per the table below. **Potential Providers will agree the level of complexity with the individual Contracting Authority at Call Off Stage.**

Complexity	Definition
LOW Complexity	Single phase project or programme of work; Limited or no demolition (<5% of project costs); Limited infrastructure works (<5% of project costs); Unoccupied building; Services element <25% of project costs; Predominantly single building use.
MEDIUM Complexity	More than a single phase project or programme of work (2 to 5 phases); Partial demolition (5% to 15% of project costs); Some infrastructure works (5% to 15% of project costs); Occupied or partially occupied building; Services element <50% of project costs; More than one type of building use.
HIGH Complexity	Multiple phase project or programme of work (> 5 phases); Demolition (> 15% of project costs); Major infrastructure works (> 15% of project costs); Occupied property, involving re-stack/decanting; Services element >50% of project costs; Multiple building uses.

- 8.2 The percentage fees inserted by the Potential Provider into the red cells in **Part 1: Percentage Project Fees** shall be based on a project of MEDIUM complexity. These rates will be deemed as a 'base rate' and will automatically populate the column marked MEDIUM complexity (with no adjustment to the percentage fees inserted in the red cells in Part 1: Percentage Project Fees).
- 8.3 For LOW complexity projects, the Potential Provider shall insert a percentage adjustment to the 'base rate'. A negative adjustment to the MEDIUM complexity rate requires a minus (-) to be inserted in front of the percentage adjustment. These rates will then automatically populate the column marked LOW complexity. Potential Providers may only enter an adjustment in the LOW complexity cell that is less than or equal to zero (0). Any Potential Provider who fails to comply with this requirement is deemed to have provided a non compliant Tender and may be excluded from further participation in this Procurement.
- 8.4 For HIGH complexity projects, the Potential Provider shall insert a percentage adjustment to the 'base rate'. A positive adjustment to the MEDIUM complexity rate requires a plus (+) to be inserted in front of the percentage adjustment. These rates will then automatically populate the column marked HIGH complexity. Potential Providers may only enter a percentage adjustment in the HIGH Complexity cell that is greater than or equal to zero (0). Any negative entry will highlight in red. Any Potential Provider who fails to comply with this requirement is deemed to have provided a non compliant Tender and may be excluded from further participation in this Procurement.
- 8.5 For the avoidance of doubt, the Potential Provider may decide to offer no adjustment for either LOW or HIGH complexity projects, in which case, the Potential Provider shall insert zero (0).
- 8.6 Potential Providers should note that the adjustment for project complexity applies to all value bands, for each Procurement Type.

- 8.7 The inclusion of an adjustment to the 'base rate' is a commercial decision made by the Potential Provider when completing the Price Model workbook.
- 8.8 The 'greyed out' table within Part 1. Percentage Project Fees worksheet is for illustration purposes only, and enables the Potential Provider to see the impact of the rates inserted into the main tables when adjusted for project complexity and regional variation.

INSTRUCTIONS FOR COMPLETION - PRICE MODEL WORKBOOK (PART 2 TIME CHARGE FEES)

9. Introduction

- 9.1 Potential Providers shall submit Time Charge Fees by completing the Price Model worksheet(s) for both hourly and daily fee rates for each grade and for each Discipline for the Lot(s) for which the Potential Provider is submitting a Tender.
- 9.2 A guide to the requirements of each grade for each Discipline is set out in the table at Attachment 9a Annex A – Schedule of Services, and Attachment 9b Annex B - Qualifications & Experience.
- 9.3 The cells requiring completion by the Potential Provider in the Time Charge Fees worksheet(s) are coloured **red**. The entry into each cell must be greater than zero (0) and all cells must be completed in accordance with this guidance. Potential Providers shall note that only currency values can be inserted into the worksheets.
- 9.4 All rates will be rigorously checked for compliance with the statutory minimum wage requirements. Potential Providers shall ensure that the hourly and daily rates submitted meet or exceed the National Minimum Wage and National Living Wage.
- 9.5 Potential Providers **MUST** complete all Time Charge worksheet(s) for the Lot(s) for which they are submitting a Tender.
- 9.6 All daily rates shall be based upon an eight (8) hour working day, excluding all breaks. If the Potential Provider is commissioned on a daily rate basis, this rate shall apply regardless of the number of hours worked during the working day.
- 9.7 Potential Providers shall note that the daily rate shall not be greater than the hourly rate multiplied by eight (8) hours.
- 9.8 The Time Charge Fees for hourly and daily rates shall include all travel and subsistence costs, and shall be fully inclusive of all necessary travel time.
- 9.9 The 'greyed out' table within Part 2. Time Charge Fees worksheet is for illustration purposes only, and enables the Potential Provider to see the impact of the rates inserted into the main tables when adjusted for regional variation.
- 9.10 Any Potential Provider who fails to comply with the above requirements shall be deemed to have submitted a non compliant Tender and may be excluded from further participation in this Procurement.

INSTRUCTIONS FOR COMPLETION - PRICE MODEL WORKBOOK (PART 3 REGIONAL VARIATIONS)

10. Introduction

- 10.1. Potential Providers shall complete **Part 3: Regional Variations** for Percentage Project Fees and Time Charge Fees in accordance with the instructions set out below.
- 10.2. The regions are based on UK Regional NUTS codes. There are a total of six (6) regions, two of which (**Region 4 - North Region** and **Region 5a - South Region**), contain a number of distinct areas, as defined by the relevant NUTS codes. A single percentage adjustment shall be inserted for each Region, rather than for the individual NUTS code areas for Region 4 and for Region 5a.

11. Regional Variations for Percentage Project Fees

- 11.1. The cells requiring completion by the Potential Provider are coloured **yellow**.
- 11.2. The percentage fees inserted by the Potential Provider into the red cells in **Part 1: Percentage Project Fees** (based on a project of MEDIUM complexity as noted in paragraph 8.2 above) will be deemed to be the 'base rates'.
- 11.3. Potential Providers shall enter an adjustment from their 'base rates' as noted immediately above. Potential Providers wishing to submit a negative adjustment (i.e. reduction) shall enter a minus (-) sign in front of the percentage adjustment rate. If no adjustment is required the Potential Provider shall enter zero (0).
- 11.4. Adjustments entered for any regional variations will be used in the calculation of average fee rates in worksheet **Part 5: % Project Fees Summary**.

12. Regional Variations for Time Charge Fees

- 12.1. The cells requiring completion by the Potential Provider are coloured **yellow**.
- 12.2. The Potential Provider shall enter an adjustment to their hourly and daily rates (worksheet Part 2: Time Charge Fees). Potential Providers wishing to submit a negative adjustment (i.e. reduction) shall enter a minus (-) sign in front of the percentage adjustment rate. If no adjustment is required the Potential Provider shall enter zero (0).
- 12.3. Any adjustments entered for regional variations will be used in the calculation of average fee rates in worksheet **Part 4: Time Charge Fees Summary**.
- 12.4. Application of the regional variations will be determined by the location of the delivery of the Service.

PRICE EVALUATION

13. Introduction to Evaluation Model

- 13.1. This section describes how Potential Providers' Price submissions will be evaluated.
- 13.2. The split between the weightings for Quality and Price in respect of this procurement are set out below:-

Quality: 75%

Price: 25%

- 13.3. Therefore, 25% of the total weighted score is allocated to the pricing element of each Lot. The Price weighting is further apportioned as follows:

Percentage Project Fees: 20%

Time Charge Fees: 5%

- 13.4. Potential Providers' Price Scores will be calculated using the combined score of the **Percentage Project Fees** and **Time Charge Fees**.
- 13.5. Where there is more than one Core Service Discipline in the respective Lot for which the Potential Provider is submitting a Tender, the Price weighting is split across each Core Service Discipline, reflecting the relative importance of each discipline within that Lot.
- 13.6. The table at Annex B – Evaluation Weightings sets out the weightings for each Lot and each Lot grouping.
- 13.7. Potential Providers' submitted Prices for worksheets **Part 1: Percentage Project Fees** and **Part 2: Time Charge Fees** will be evaluated.
- 13.8. Potential Providers' submitted Prices will be sub-weighted against each Price component. These are clearly set out within the Price Model workbooks.

14. Percentage Project Fees

14.1. Maximum Fee Apportionment to Project Stages

- 14.1.1. Potential Providers shall note that for each Core Service Discipline and for each Procurement Type the Authority has set a 'Maximum Fee Apportionment'. This relates to the cumulative total of the fee at the 'Pre-Contract' stage of the Project, i.e. Stages 0-4 of the RIBA Plan of Work 2013.
- 14.1.2. The workbooks are automatically set to calculate the percentage of the total fee payable for each Core Service Discipline for Stage 0 to Stage 4 inclusive. The Authority has set its maximum fee apportionment and this is clearly indicated for each table within **Part 1: Percentage Project Fees** worksheet.
- 14.1.3. If the Potential Provider's percentage apportionment of the fee exceeds the Authority's maximum fee apportionment, then the cell entitled 'Stage 0-4 as percentage of total fee' will turn red.

- 14.1.4. Any Potential Provider who enters percentage fees that, in total for Stage 0 to Stage 4, exceeds the 'Maximum Fee Apportionment' for any Core Service Discipline and for any Procurement Type shall be deemed to have submitted a non compliant Tender and may be excluded from further participation in this Procurement.
- 14.1.5. Potential Providers should note that the 'Maximum Fee Apportionment' for each Core Service Discipline and for each Procurement Type are based on evidence of previous frameworks and best practice.

15. Calculation of Percentage Project Fees

15.1. **Part 5: % Project Fees Summary** worksheet is automatically populated with the rates inserted by the Potential Provider in the following worksheets:-

- **Part 1: Percentage Project Fees** worksheet (from the Price Model tables for each Procurement Type)
- **Part 1: Percentage Project Fees** worksheet (from the Project Complexity tables)
- **Part 3: Regional Variations** worksheet (from the rates inserted for each region in the column entitled Percentage)

15.2. The calculation of the Percentage Project Fees follows a five-step process as set out below:-

15.2.1. In **Step 1**, the Prices submitted by the Potential Provider in **Part 1: Percentage Project Fees** worksheet will automatically populate **Part 5. % Project Fees Summary** worksheet: **Table 1 – Weighted Percentage Fees (By Value Band)**. The Prices are then automatically weighted by the column entitled 'Value Band Weighting' by an adjustment factor of 0.5, 0.75, 1.00, 1.25 or 1.50. These weightings are used to indicate the estimated likelihood of projects within the value bands. Therefore, the weighting is higher where the 'Project Value' is more likely to apply. The Value Band Weighting is then multiplied by the Potential Provider's submitted Price to establish the 'Weighted Fee Percentage'. This process is replicated for all Procurement Types. Finally, the average (mean) 'Average Weighted Fee Percentage' is calculated. This is illustrated in the table below:

Table 1 – Weighted Percentage Fees (By Value Band)			
Project Value	Design & Build Single Stage		
	%	Value Band Weighting	Weighted Fee %
0 – 500,000	9.000%	0.75	6.750%
500,001 – 3,000,000	8.000%	1.25	10.000%
3,000,001 – 5,000,000	7.000%	1.50	10.500%
5,000,001 – 10,000,000	6.000%	1.50	9.000%
10,000,001 – 20,000,000	5.500%	1.25	6.875%
20,000,001 – 30,000,000	4.000%	1.00	4.000%
30,000,001 – 50,000,000	3.000%	0.75	2.250%
>50,000,001 – 75,000,000	2.000%	0.50	1.000%
>75,000,001	1.000%	0.50	0.500%
Average Weighted Fee Percentage			5.653%

- 15.2.3. In **Step 2, Part 5. % Project Fees Summary** worksheet: **Table 2 – Complexity Adjusted Average Percentage Fees** is automatically populated with the Potential Provider's 'Average Weighted Fee Percentage' and the adjustment for "Project Complexity" for each Procurement Type. These figures are taken from **Part 1. Percentage Project Fees** worksheet, and are then used to calculate the Complexity Adjusted Average Fee. The fees as calculated above are automatically transferred into the MEDIUM complexity cell. The adjustments entered by the Potential Provider for LOW and HIGH complexity, are multiplied by the 'Average Weighted Fee Percentage' to calculate an 'Adjusted Average Fee'. This methodology is replicated across all Procurement Types. This is illustrated in the table below:

Table 2 – Complexity Adjusted Average Percentage Fees		
Project Complexity	Potential Provider Adjustment	Adjusted Average Fee
Low	-5.000%	5.370%
Medium	0.000%	5.653%
High	5.000%	5.935%

- 15.2.4. In **Step 3** the Potential Providers' 'Regional Adjustment' is applied to the 'Complexity Adjusted Average Percentage Fees', and this value is automatically multiplied by the 'Region Weighting'. The product of this calculation results in the 'Region Adjusted Average Fee' for each Region in **Part 5. % Project Fees Percentage Summary** worksheet: **Table 3 – Regionally Adjusted Average Percentage Fees**. This methodology is replicated across all Procurement Types. This is illustrated in the table below:

Table 3 – Regionally Adjusted Average Percentage Fees.					
Region	Regional Adjustment (Brought forward)	Region Weighting	Region Adjusted Average Fee		
			Low	Medium	High
Region 1- Scotland	4.000%	1.00	5.585%	5.879%	6.173%
Region 2 - Wales	3.000%	0.75	4.148%	4.367%	4.585%
Region 3 - Northern Ireland	4.000%	0.75	2.792%	2.939%	3.086%
Region 4 - North Region	3.000%	1.00	5.531%	5.822%	6.113%
Region 5a - South Region	2.000%	1.25	6.847%	7.207%	7.568%

Region 5b - South Region	0.000%	1.25	8.055%	8.479%	8.903%
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15.2.5. In **Step 4** the figures in 'Region Adjusted Average Fee' for each of the LOW, MEDIUM or HIGH columns (**Part 5. % Project Fees Percentage Summary** worksheet: **Table 3 – Regionally Adjusted Average Percentage Fees**) are averaged (a mean is applied). These three figures are automatically transferred to the 'Average Fee Percentage by Project Complexity' row in **Part 5. % Project Fees Percentage Summary** worksheet: **Table 4 – Summary Table to 'Tender Summary'**.

15.2.6. In **Step 5** the average (mean) of the three figures (transferred at the end of Step 4) is then calculated and the value transferred to **Part 5. % Project Fees Percentage Summary** worksheet: **Table 4 – Summary Table to 'Tender Summary'** to result in the 'Average Fee Percentage to Tender Summary' figure. This methodology is replicated across all Procurement Types. This is illustrated in the table below:

Table 4 – Summary Table to "Tender Summary"			
Procurement Type	Design & Build Single Stage		
Project Complexity	Low	Medium	High
Average Fee Percentage by Project Complexity	5.493%	5.782%	6.071%
Average Fee Percentage to Tender Summary			5.782%
Maximum Percentage Project Fee Score by Procurement Type			4.250%

15.2.7. The 'Average Fee Percentage to Tender Summary' for each Procurement Type is automatically transferred to the 'Average Fee Percentage' column at **Part 6: Tender Summary** of the Price Model workbook. This is illustrated in the table below:

Percentage Fees		
Procurement Type	Average Fee Percentage	Percentage Project Fee Score by Procurement Type
Design & Build Single Stage	5.782%	4.250%
Design & Build Two Stage	5.576%	4.250%
Traditional	5.866%	4.250%
Two Stage Open Book	5.646%	4.250%
Cost Led Procurement	5.600%	2.000%
Integrated Project Insurance	5.443%	1.000%

Total Percentage Project Fee Score	20.000%
---	----------------

15.3. Potential Providers shall note that all calculations within the Price Model workbook to arrive at the final “Average Fee Percentage” for each Procurement Type are based on rounding the calculations to three decimal places. The calculated ‘Average Fee Percentage’ taken to **Part 6: Tender Summary** worksheet will be evaluated against other Potential Providers’ ‘Average Fee Percentage’ in a separate evaluation workbook and is set out below at paragraph 17.

16. Calculation of Time Charge Fees

16.1. **Part 4: Time Charge Summary** worksheet automatically populates the rates inserted by the Potential Provider in the following worksheets:-

- **Part 2: Time Charge Fees** worksheet (from the Price Model workbooks for each Procurement Type)
- **Part 3: Regional Variations** worksheet (from the Price Model workbooks from the rates inserted for each region in the column entitled “Time Charge Fees”)

16.2. The calculation of the Time Charge Fees follows a three-step process as set out below:-

16.2.1. In **Step 1**, the Prices submitted by the Potential Provider in **Part 2: Time Charge Fees** worksheet will automatically populate the Hourly Rate and Daily Rate columns in **Part 4 – Time Charge Fees Summary: Table 1 – Weighted Time Charge Fees**. The Prices will be weighted by the ‘Grade Weighting’ column by an adjustment factor of 0.25, 0.75, 1.00, 1.25 or 1.50. These weightings are used to indicate the estimated likelihood of each grade undertaking ‘Time Charge’ work. Therefore the weighting is higher where the likelihood of the ‘Grade’ undertaking the work is more likely to apply.

16.2.2. To establish the ‘Weighted Hourly Rate Value’ and ‘Weighted Daily Rate Value’ the ‘Grade Weighting’ is then multiplied by the Potential Provider’s Time Charge Fees from **Part 2: Time Charge Fees** worksheet for both Hourly and Daily ‘Time Charge Fee Prices’. Finally, the average (mean) for each of the ‘Weighted Hourly Rate Value’ and ‘Weighted Daily Rate Value’ columns is calculated and entered into the ‘Average Value’ row under each column. This is illustrated in the table below:

Table 1 – Weighted Time Charge Rates					
Grade	Grade Weighting	Hourly Rate	Weighted Hourly Rate Value	Daily Rate	Weighted Daily Rate Value
Partner or Director	1.00	£100.00	£100.00	£750.00	£750.00
Senior Professional	1.25	£90.00	£112.50	£700.00	£875.00
Professional	1.50	£70.00	£105.00	£520.00	£780.00
Senior Technician	1.25	£60.00	£75.00	£450.00	£562.50

Technician	0.75	£50.00	£37.50	£380.00	£285.00
Admin/Junior Technician/Apprentice	0.25	£30.00	£7.50	£220.00	£55.00
Average Value			£72.917		£551.250

16.2.3. In **Step 2**, the 'Time Charge' 'Regional Adjustment' provided by the Potential Provider in **Part 3: Regional Variations** worksheet is applied to the 'Average Value' Hourly and Daily rates. A 'Region Weighting' is then applied to calculate the Hourly and Daily 'Region Adjusted Rates'.

16.2.4. In **Step 3**, the average (mean) for each of the Hourly and Daily 'Region Adjusted Rates' columns is calculated and transferred into the 'Average Value to Tender Summary' row under each column. This is illustrated in the table below:

2. Regionally Adjusted Average Time Charge Rates				
Regional Adjustment	Regional Adj	Region Weighting	Region Adjusted Rates	
			Hourly Rate	Daily Rate
Region 1- Scotland	3.000%	1.00	£75.10	£567.79
Region 2 - Wales	3.000%	0.75	£56.33	£425.84
Region 3 - Northern Ireland	3.000%	0.75	£37.55	£283.89
Region 4 - North Region	3.000%	1.00	£75.10	£567.79
Region 5a - South Region	2.000%	1.25	£92.97	£702.84
Region 5b - South Region	0.000%	1.25	£109.38	£826.88
Average Value to Tender Summary			£74.405	£562.505

16.2.5. The 'Average Value to Tender Summary' is the average (mean) of the grades adjusted for 'Grade' and 'Regional Adjustment'. The 'Average Value to Tender Summary' for both Hourly and Daily rates is automatically transferred in to the 'Average Region Adjusted Values' cells in the Time Charge Fees table in **Part 6: Tender Summary** worksheet. This is illustrated in the table below:

Time Charge Fees		
Discipline	Average Region Adjusted Values	Maximum Time Charge Fee Score by Rate
Hourly Rates	£74.405	2.500%
Daily Rates	£562.505	2.500%
Maximum Time Charge Fee Score		5.000%

16.2.6. Potential Providers shall note that all calculations within the Price Model workbook in order to arrive at the final 'Average Region Adjusted Value' for Time Charge Fees are based on rounding the calculations to two decimal places. The calculated 'Average Region Adjusted Value' taken to **Part 6: Tender Summary Worksheet** will be evaluated against all other Potential Providers' 'Average Region Adjusted Value' in a separate evaluation workbook and is set out below at paragraph 17.

17. **Price Evaluation Process**

17.1. **Introduction**

17.1.1. The Potential Provider's score collated within the Tender Summary sheet is transferred to the Price Evaluation workbook and evaluated against all other Potential Providers' submitted Tenders.

17.1.2. The Authority will total all Potential Providers' scores within the evaluation workbook.

17.1.3. Potential Providers are reminded that bids will be assessed against a median threshold in accordance with paragraph 5 Abnormally Low Tenders.

17.2. **Percentage Fees**

17.2.1. Potential Providers' 'Average Fee Percentage' for each of the 6 Procurement Types is evaluated against all other Potential Providers' 'Average Fee Percentage' to establish their weighted score for each Core Service Discipline.

17.2.2. The Potential Provider with the lowest 'Average Fee Percentage', shall be awarded the 'Maximum Percentage Project Fee Score' for that Procurement Type. The remaining Potential Providers shall be awarded a 'Weighted Score' of the 'Maximum Percentage Project Fee Score' equal to their Price, relative to the lowest Price submitted. The calculation used is as follows:

$$\begin{array}{c}
 \boxed{\text{'Weighted Score'}} = \frac{\boxed{\begin{array}{c} \text{Lowest 'Average Fee Percentage'} \quad \times \quad \text{Maximum Percentage Project Fee Score} \end{array}}}{\boxed{\text{Potential Provider's 'Average Fee Percentage'}}}
 \end{array}$$

Worked example of 'Average Fee Percentage' score calculation for Design & Build Single Stage

- i. Supplier 2 submits the lowest 'Average Fee Percentage' of 15.000%. Supplier 2 is awarded the 'Maximum Percentage Project Fee Score' of 3.500%;

ii. Supplier 1 submits an 'Average Fee Percentage' of 20.000%. As the Tender is higher than Supplier 2's price, Supplier 1 is awarded 75% of the 'Maximum Percentage Project Fee Score', namely a 'Weighted Score' of 2.630%;

iii. Supplier 3 submits an 'Average Fee Percentage' of 18.000% and is awarded 83.33% of the 'Maximum Percentage Project Fee Score', namely a 'Weighted Score' of 2.920%.

Design & Build Single Stage				
Potential Provider	Average Fee Percent	Maximum Percentage Project Fee Score	Lowest Tender	Weighted Score (%)
Supplier 1	20.000%	3.500%		2.630%
Supplier 2	15.000%	3.500%	15.00%	3.500%
Supplier 3	18.000%	3.500%		2.920%

17.2.3. The Potential Provider's 'Weighted Score' (highlighted orange), is combined for all of the 6 Procurement Types (each Procurement Type has a separate weighted score outlined in Annex B of this document) for each Core Service Discipline. This will result in the calculation of a 'Total Percentage Project Fee Score', with a maximum Percentage Project Fee score of 20% available to Potential Providers.

17.3. Time Charge Fees

17.3.1. Potential Providers' 'Average Region Adjusted Values' are evaluated against all other Potential Providers' 'Average Region Adjusted Values' to establish their weighted score for each Core Service Discipline.

17.3.2. The Potential Provider with the lowest 'Average Region Adjusted Values' (Hourly or Daily), shall be awarded the 'Maximum Time Charge Fee Score' for that Procurement Type (Hourly or Daily). The remaining Potential Providers shall be awarded a 'Weighted Score' of the 'Maximum Time Charge Fee Score' equal to their Price, relative to the lowest Price submitted. The calculation used is as follows:

$$\begin{array}{c}
 \text{'Weighted Score'} \\
 \hline
 \end{array}
 =
 \frac{
 \begin{array}{c}
 \text{Lowest 'Average Region Adjusted Values'} \times \text{Maximum Time Charge Fee Score (Hourly)}
 \end{array}
 }{
 \begin{array}{c}
 \text{Potential Provider's 'Average Region Adjusted Values'}
 \end{array}
 }$$

The following example shows how the Hourly 'Average Region Adjusted Values' are evaluated; the same steps are taken to evaluate the Daily 'Average Region Adjusted Values'.

Worked example of 'Average Region Adjusted Values' score calculation (Hourly rate, Architect - Core Service Discipline)

- i. Supplier 3 submits the lowest Hourly 'Average Region Adjusted Values' of £150. Supplier 3 is awarded the 'Maximum Time Charge Fee Score (Hourly)' of 2.500%;
- ii. Supplier 1 submits an 'Average Region Adjusted Values' of £200. As the Tender is higher than Supplier 3's price, Supplier 1 is awarded 75% of the 'Maximum Time Charge Fee Score (Hourly)', namely a 'Weighted Score' of 1.880%;
- iii. Supplier 2 submits an 'Average Region Adjusted Values' of £175. As the Tender is higher than Supplier 3's price, Supplier 1 is awarded 86% of the 'Maximum Time Charge Fee Score (Hourly)', namely a 'Weighted Score' of 2.140%.

Hourly Rates				
Tenderer	Average Region Adjusted Value	Maximum Time Charge Fee Score (Hourly)	Lowest Tender	Weighted Score (%)
Supplier 1	£200.00	2.500%		1.880%
Supplier 2	£175.00	2.500%		2.140%
Supplier 3	£150.00	2.500%	£150.00	2.500%

17.3.3. The Potential Provider's 'Weighted Score' (highlighted orange), is combined for each Core Service Discipline and provides a 'Total Time Charge Fee Score', with a maximum Time Charge Fee score of 5% (including both Hourly and Daily maximum scores) available to Potential Providers.

18. Final Tender Summary Evaluation

- 18.1. Upon completion of the 'Total Percentage Project Fee Score' and 'Total Time Charge Fee Score' evaluation, the two scores are combined to provide a final 'Total Weighted Score'.

Example of Final 'Total Weighted Score':

Tenderer	Total Percentage Project Fee Score	Total Time Charge Score	Total Weighted Score
Supplier 1	15.020%	3.070%	18.090%
Supplier 2	20.000%	5.000%	25.000%
Supplier 3	18.350%	3.850%	22.200%

ANNEX A - DISCIPLINES & SERVICES

1. Core Service Disciplines

1.1 The Core Service Disciplines are set out below:-

- Project Lead
- Architect
- Lead Designer
- Building Services Engineer
- Civil and Structural Engineer
- Client Adviser
- Cost Consultant (Quantity Surveyor)
- Contract Administrator
- Principal Designer
- BIM Information Manager
- BIM Co-Ordinator

1.2 Full descriptions of each of the disciplines are set out at Framework **Schedule 2: Services and Key Performance Indicators - Annex A – Schedule of Services (Attachment 9a).**

1.3 Potential Providers shall review the scope of Services for each Core Service Discipline for each Procurement Type when completing the Price Model workbooks and ensure that the fees entered cover the **full Scope of Services specified.**

1.4 Non-Core Service Discipline(s)

1.5 In addition to the Core Service Disciplines summarised above, the Framework may also require the provision of Non-Core Service Discipline(s).

1.6 The Non-Core Services comprise the following:-

- Access Surveyor (Disability Discrimination Act)
- Acoustic Engineer
- Asbestos Surveyor
- Building Surveyor
- Clerk of works (Supervisor role – NEC)
- Conservation Architect
- Construction Lead
- Counter Terrorism Advice / Design
- Environmental Services Advisor
- Fire & Sprinkler Engineer
- General IT / Designer
- Security Advisor
- Health & Safety Advisor
- Historical Buildings Architect
- Interior Designer
- Land Surveyor
- Landscape Architect
- M&E Engineer
- Migration Planner and Manager
- Public Health Advisor
- Risk Advisor

- Space Planning & Design Services Advisor
- Town Planning Consultant
- Technical Author
- Waste Management Advisor

1.7 The interface between the Core Service Disciplines and the Non-Core Service Discipline Services will be finalised at the time of the Call Off Procedures, but an outline indication is as follows:-

- 1.7.1 The Non-Core Service Disciplines may include a requirement for surveys and reports, advice at feasibility and concept design stages, provision of design and specification for equipment or other items of work within the Non-Core Service Discipline specialism and site visits during construction as necessary.
- 1.7.2 The requirement for the Non Core Service Discipline(s) is likely to be in addition to the provision of the Core Service Disciplines. However, Contracting Authorities may only require Non Core Service Disciplines.
- 1.7.3 Non-Core Service Discipline(s) will be priced as part of a Call Off Procedure.

ANNEX B – Evaluation Weightings

See separate document - Attachment 18a