

Dear Supplier

**Preliminary Market Consultation Guidance**

**Facilities Management at City Campus**

**Tender reference: EFM094 LTU**

**About this Preliminary Market Consultation**

We use preliminary market consultation (also known as early market engagement) to give suppliers the opportunity to inform the specification and be ready to meet our demand for their services.

By using this process, we wish to gain a better understanding from the market about:

* what is possible.
* what resources it might take to fulfil a contract.
* how much a contract could cost.
* opportunities for innovation.
* sustaining social value.
* progress toward carbon net zero.

Throughout this document, we provide an early insight to the services that will soon be needed, and our initial thoughts regarding the specification and procurement considerations.

Holistically, we are asking suppliers to review and comment on the basis of: **“What do you believe are the key risks and challenges for this opportunity and how would you propose that we mitigate the risks?”**

At the end of the document, we have listed a number of questions that occur to us, and we would appreciate your responses to any or all of them.

We would particularly welcome

* constructive critique.
* best practice examples (either from buyer or supplier).
* requests to further engage with the university.
* Your questions.

**About Us**

Leeds Trinity University has been providing outstanding, student-centred higher education for more than 50 years at its main campus in Horsforth, Leeds, and is the top rated university in Yorkshire and the Humber for student experience (The Times and Sunday Times Good University Guide 2023).

Being a leading career-led and applied university, our students achieve outstanding outcomes, and our well-rounded learners and graduates are sought by employers.

We are a diverse and inclusive University welcoming students from all backgrounds and beliefs.

Our leadership and governance are committed to promoting social solidarity and the Common Good through commitment to social justice, enhancing opportunities, collaboration, and by adding value to the lives of our students, staff, and University community.

Our core values, which define us as a University, are:

* dignity and care,
* solidarity and service,
* honesty and integrity,
* respect and inclusivity
* knowledge and excellence.

In support of our programme of academic growth, from September 2024, we'll be extending our best in class service, with the opening of our new City Campus.

**About City Campus**

Location: Number 1 Trevelyan Square, Leeds LS1 6AE.

City Campus is a 57,000 square foot building in the heart of Leeds City Centre, providing for a steady occupancy of approximately 1000 (c.80% students, 20% staff and services). Over six floors, 75-80% of space will be timetabled spaces. Other areas will include library, informal areas, and catering outlets.

The campus is to be operational in September 2024, although it is envisaged that utilisation will be phased, with floors 5 and 6 being ready for fit out at a later date, and possibly outside of normal teaching hours / periods.

**Architect drawings and visualisations**

[City Centre Walkthrough For Youtube 03 07 23 - YouTube](https://www.youtube.com/watch?v=lDIgSbRTRyY)



**Opening Hours**

* Monday to Friday 0800-2200h (Core operating hours 0830-2100h)
* Saturday and Sunday 1100-1700h

**Occupancy and footfall**

* When fully occupied, City Campus has capacity for 1630 persons. It is not envisaged that capacity will be reached.
* Once fully operational, weekday footfall is envisaged to be 1000 students and up to 100 members of staff at any point.
* Footfall on weekends is envisaged to be 50 at most, being a mix of staff and students.
* Fluctuation to the envisaged footfall will occur (, for example, on event days, Bank Holidays, designated non-working days, and according to term times and timetables etc.).

**Timetables and term times**

* Timetables are currently being compiled for academic year 2024-25 and will be made available to the successful contractor. These will provide the contractor with insight to the envisaged number of people coming on to campus.
* The Academic Year runs from 1st August to 31st July:
  + Term 1 – Monday 2nd September 2024 to Friday 13th December 2024 inclusive
  + Term 2 – Monday 6th January 2025 to Friday 4th July 2025 inclusive
  + Bank Holidays and designated non-working days:
    - 18th April (Good Friday)
    - 21st April (Easter Monday)
    - 22nd April (LTU Holiday)
    - 5th May (Bank Holiday)
    - 26th May (Bank Holiday)
    - 27th May (LTU G&F Day)

**The services**

Primarily, facilities management will be provided in a planned manner, with schedules and rotas to cover the in-scope service areas, throughout the opening hours. There will be additional requirement to provide reactive response to incidents regardless of whether they occur during opening hours or ‘out of hours’.

Envisaged services to be in scope:

* Reception Services.
* Car Park Management.
* Cleaning Services including hygiene, window, and glazing cleaning.
* Pest control.
* Porters’ services.
* Waste Management.
* Grounds Management

Not in Scope

* Security, manned guarding
* Catering
* Any services at Horsforth Campus

**Basis of contract**

**Duration**

* To allow early contractor mobilisation, the contract will be deemed effective immediately upon award.
* The full gamut of services will need to be ‘business as usual’ by 15th September 2024.
* Duration will be based upon academic years and will not expire during term time.
* Duration is envisaged to be three years, with options to extend twice, one year at a time, based upon satisfactory performance and continued demand.

**Price**

We envisage that Price:

* will be on the basis of a Fixed Contract Sum, inclusive of all costs.
* increases will be prohibited in the initial period.
* increases will be applied for and will be evidence based – an annual uplift will not be agreed.
* will be dependent upon the contractor’s performance against the agreed SLA.
* may decrease in line with market conditions.

**Service Level Agreement (SLA)**

The SLA will evolve in pursuit of continual improvement, particularly as the University develops its understanding of the Campus patronage. The contractor will contribute to the advancement of service and will agree performance indicators that will be measurable and reportable, for example identified efficiencies, economies of scale, innovations or any other improvements to the service that can be reasonably achieved. This work will inform the independent Post Occupancy Evaluation exercise that will be undertaken one year after initial occupation, in accordance with BREEAM criteria.

**About the contractor**

The contractor recognises it will:

* enter an arrangement based on trust, fairness, and mutual co-operation to develop and deliver the service to the highest possible standards, befitting a high-profile education provider and valued students.
* deliver a student focussed service, which demonstrably adopts the university’s values, and proactively contributes to student experience.
* Respond flexibility to the challenging Higher Education environment.

**About the tender**

**Selection Criteria:**

* The university will use a suitability questionnaire to determine whether a contractor has the capacity and capability to perform the services. We assess the selection criteria before considering how any contractor proposes to deliver the service.
* Some mandatory and discretionary exclusion criteria are set by The Public Contracts Regulations – these are mainly in relation to the contractor obeying law.
* Other suitability criteria will include financial standing, insurances, resources, technical proficiency, and past experience.

We have identified the following ISO standards that we consider to be relevant systems of work:

* ISO 41001:2018 Facility management - Management systems.
* ISO 45001:2018 Occupational Health and Safety.
* ISO 9001:2015 Quality Management Systems.
* ISO 14001:2015 Environmental Management Systems.
* ISO 27001:2022 Information Security, Cyber Security and Privacy Protection.

**Award Criteria**

The university set out a tender questionnaire that will use three award criteria to evaluate tenders it receives:

1. Price
2. Sustainability
3. Quality

Together, the award criteria will establish which tender offers the best value for money.

The Quality criteria will be used to understand how a contractor proposes to deliver the services and will be relevant and proportionate to the contract requirements.

We have initially identified some Quality criteria that we think are relevant:

Senior Management team with responsibility for this contract:

* Who are they?
* Why are they the right people for this contract?
* What roles will they perform, and with what organisational authority?

Project team and operatives performing this contract:

* Who are they?
* Why are they the right people for this contract?
* What roles will they perform?
* Provide an organogram hierarchy chart showing lines of responsibility and staffing numbers.

Management Software

* What system will be used?
* How does it operate?
* Is it ‘real-time’ or updated periodically?
* What access / visibility will LTU have?
* What integrations and relative resources will be required from LTU?
* How will the system integrate with the university’s CAFM system?
* What benefits to the university does the system bring?
* Cyber Essentials

Please describe how the service will be delivered in each service area, including:

* Service standards, frequencies,
* Resources (numbers; in-house or sub-contract)
* Roles and Responsibilities
* Management & supervision proposed.
* Operational Resources (shift patterns etc.)
* How the service will be measured and reported
* Procedures and controls to ensure high service-quality?
* approach to the management and mitigation of health & safety risks and impacts.

**Weightings**

We will use weightings to demonstrate which award criteria, or quality questions, are most important in relation to each of the other.

**Tender process**

After the Preliminary Market Consultation has concluded, the university will invite tenders.

The tender process will be wholly conducted via the university’s e-sourcing website <https://neupc.delta-esourcing.com/members/leeds-trinity-university/>

Once tenders have been invited, any questions relating to the tender must be submitted via the ‘Message Centre’ of the university’s e-sourcing website.

We may announce a pre-tender site visit event for prospective tenderers. Attendance at site visit events is by appointment only. The university may need to refuse admission to any delegate that is not pre-registered.

**Timetable**

Very approximately, we envisage the tender timetable to be:

* January / February - Preliminary Market Consultation
* February / March - Tender Period
* March / April - Evaluation and clarifications, contract award (Standstill period)
* April / May - Mobilisation

**Consultation questions:**

WHAT MOBILISATION PERIOD WILL BE NEEDED?

We are keen to make sure that we leave enough time between contract award and the service becoming business as usual, noting that there will be a phased implementation ahead of BAU. We would like to balance that with allowing enough time ahead of the evaluations for suppliers to prepare their tenders.

WILL IT BE OF BENEFIT FOR **TENDERERS** TO SEE THE ACADEMIC TIMETABLE?

For the benefit of service delivery, the awarded contractor will be given details on the academic timetable, showing rooms being used, and predicted attendances. We want to know if having sight of the timetable will tangibly benefit suppliers in relation to their tender submission. If it is, we will need to factor it in to the tender timetable, noting that At this juncture, the timetables are being finalised, but we don’t know how long that might take.

WILL IT BE OF BENEFIT FOR **TENDERERS** TO SEE FLOOR PLANS?

What information about the floor plans will be useful? Rooms per floor? Capacity per room?

LONGER/SHORTER CONTRACT DURATION CAN BE CONSIDERED

We think that the typical duration of FM contracts is between three and five years. We want to understand what the optimum duration of contract will be, given that we are pursuing a ‘partnership approach’, balanced by the expectation that we will test the market periodically to ensure value for money.

WHAT INVESTMENT WILL NEED TO BE RECOUPED?

If there are significant set up costs for the successful contractor, we would want to see them amortised over the duration of the contract, rather than in the short term and presumably at a higher price. Understanding the set up costs will help us set the appropriate contract duration.

WHAT BENEFITS WILL BE REALISED IN RETURN FOR A LONGER TERM CONTRACT?

The ‘learning curve benefit’ is expected to bring continually improved service levels as the contract evolves… but what will these benefits be? Do suppliers have any best practice examples that could be shared with us?

HOW WILL YOU CALCULATE PRICE?

We are looking for indicative pricing for this contract to conclude our Business Case. An estimate of the total contract sum will be useful, but more so will be a breakdown of the component parts, and any known future impacts, such as changes to minimum wage legislation for example.

TUPE

There is no incumbent contract.

TERMS AND CONDITIONS OF CONTRACT

We would appreciate sight of suppliers template terms and conditions, and any commentary that highlights and provides rationale for clauses that you would wish to be protected, so that these can be considered for inclusion ahead of the tender period.

HOW SHOULD WE ASSESS A CONTRACTOR’S PREVIOUS EXPERIENCE?

We would be interested to know how you would demonstrate your organisation’s successful track record. Would you use case studies, site visits, simple references?

WHAT ARE THE INDUSTRY’S TYPICAL FINANCIAL INDICATORS?

We will need to stress test the financial stability of the contractor before awarding any contract. What should we be looking for? Are there industry standard tolerances to financial ratios? Do FM service providers have pressure points in their evolution before being considered to have longevity?

Is there a minimum turnover threshold that would be suitable for us to use?

WHAT TYPES AND LEVELS OF INSURANCE SHOULD THE CONTRACTOR HAVE OR BE ABLE TO OBTAIN?

Aside from Employers’ and Public Liabilities, are there any other specialist indemnities that FM service providers should have in place?

MANDATORY OR PROFESSIONAL QUALIFICATIONS, MEMBERSHIPS OR CERTIFICATION

Must FM service providers, or their operatives, have to attain a professional qualification in order to be able to provide the service? Is it mandatory for the contractor or its operatives to be members of any industry body, or be certified in any way? Similarly, what industry qualification, membership or certification would be of assurance to the university about the contractor?

ARE THERE OTHER ISO or EQUIVALENT STANDARDS THAT ARE RELEVANT TO THE CONTRACT?

We’ve identified a selection of ISO’s that we think might be relevant to the contract requirements, but have we got it wrong? Are there others?

WHAT MAKES A GOOD CONTRACTOR?

Helping us understand what good practice looks like will inform our evaluation criteria. Please review and comment on the quality questions we have identified.

WHAT OTHER QUALITY QUESTIONS SHOULD WE CONSIDER INCLUDING?

WHICH CRITERIA SHOULD WE CONSIDER TO BE MOST IMPORTANT?

WHAT ‘RED FLAGS’ SHOULD WE BE AWARE OF?

Helping us understand what poor practice looks like will inform our evaluation criteria.

WHAT ADVICE WOULD YOU GIVE US ABOUT THE REQUIRED DURATION OF THE TENDER PERIOD?

WHAT INFORMATION WOULD YOU NEED TO SEE IN OUR INVITATION TO TENDER TO ENABLE YOU TO PUT FORWARD YOUR MOST COMPELLING PROPOSAL?

IN YOUR EXPERIENCE, HOW LONG DOES IT TAKE FOR BUYERS TO CARRY OUT THEIR EVALUATION?

WHAT MISTAKES DO BUYERS MAKE WHEN INVITING TENDERS FOR FM?

WHAT IS THE SIZE OF THE MARKET THAT YOU OPERATE IN?

How many competitors are there likely to be for a contract such as ours, and what sort of companies are they (SME, Large etc).

WHAT MAKES A CONTRACT OPPORTUNTITY ATTRACTIVE?