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**EFA Contractors Framework**

**Invitation to Tender Volume 7**

**Technical Requirements**

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| This ITT template should be read in conjunction with the following guidance and template documents:   1. Invitation to Tender for Local Competition Volumes 1-7 2. Invitation to Tender Volume 8 – Evaluation Matrix | | | | | | | |
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**PART 1: DESIGN AND CONSTRUCTION CONTRACTUAL PROPOSALS**

This section requires Panel Members are to provide their design and construction proposals for the [refurbished/partially new build school] to a level which will allow the Framework User to establish the bid offering best value for money and sufficient to allow a detailed planning application to be made within the programme requirements. Panel Members are required, as part of the bid submission requirements set out in Volume 1, to provide the following documents, clearly labelled, and in a form suitable for annexure to the Design and Build Contract:

|  |  |  |
| --- | --- | --- |
| **Ref** | **DOCUMENTS AND DRAWINGS REQUIRED AT ITT** | **MINIMUM CONTENT** |
| **0.0** | **COMPLIANCE** |  |
| 0.1 | Written statement: | confirming compliance with all relevant and current regulations  confirming compliance with the Authority Requirements |
| 0.2 | Schedule of accommodation ‘as proposed’, including net and gross areas, in the standard format; | |
|  | Technical specifications and product descriptions, including details of internal materials, finishes and components to new and retained areas. | |
| **1.0** | **SITE MASTER PLANS** |  |
| 1.1 | 1:500 annotated site plan | showing the building(s) and grounds, taking account of the site characteristics; access and potential for future expansion, where required; areas to be retained and refurbished; and, new buildings and grounds, response to site conditions |
| 1.2 | 1:500 cross sections through the site | to illustrate the building’s relationship with the external environment. |
| **2.0** | **SCHOOL GENERAL DRAWINGS** | **Description** |
| 2.1 | 1:200 floor plans | showing rooms (annotated), suites, main entrance points and circulation flow, walls, options for extendibility, flexibility, and or adaptability, etc. All spaces to be referenced to match schedule of accommodation |
| 2.2 | 1:100 typical sections | showing levels, room heights |
| 2.3 | 1:100 main elevations | showing glazing, solid, opening vents, doors, roofs, materials |
| 2.4 | [1:200 floor plans to indicate level of investment to retained areas] | [annotated and coloured plans showing the different levels of investment, indicating the scope of works to each area of the existing buildings, including levels of remodelling/new build clearly delineated] |
| 2.5 | 1:200 Structural strategy plan | indicating the structural grid, its adaptability, and potential impact of the structure on the ICT infrastructure. |
| 2.6 | 1:500 externals | Landscape, sports facilities, access etc. |
| 2.7 | 3D drawings | showing entrance/reception area, views of building in the landscape and surrounding visual context from a number of elevations and key internal views which may include sectional representation (maximum of 8 drawings in total) |
| **3.0** | **Retained Buildings** |  |
| 3.1 | 1:100 or 1:50 section through retained buildings | To show any changes/improvements to existing building fabric (existing underlay) |
| **4.0** | **School Environment** | |
| **4.1** | Services and Environmental strategy and performance report (maximum length 20 sides of A3, to include diagrams and text font size 11 point Arial) which shall include the following. The accompanying drawings listed below shall be used to describe the equipment used as far as possible. | |
| 4.1.1 | Ventilation and cooling strategies including: example calculations, results of summertime adaptive thermal comfort calculations for typical classrooms and main spaces subject to solar gain in accordance with the FOS. Ventilation calculations and strategy including description of means of monitoring of carbon dioxide/indoor air quality levels; Means of prevention of cold drafts in classroom areas. | |
| 4.1.2 | Heating strategy including: types of heat sources; calculation of heating loads and strategy for monitoring; strategy to reduce heat losses through doors and from ventilation; strategy for any low and zero carbon technologies; | |
| 4.1.3 | Acoustic strategy including: acoustic calculations for typical spaces; schedule of pre-completion acoustic tests to be carried out; analysis of external noise levels and of noise levels of equipment; | |
| 4.1.4 | Lighting strategy including: daylight analyses for typical spaces using climate based daylight modelling; lighting layouts and luminaire and lighting control schedules for typical spaces; emergency lighting; schedules of surface reflectance and gloss factors for typical spaces; | |
| 4.1.5 | Energy and water efficiency plan including controls strategy; outline meter and loads schematic diagram; forecast of operational energy uses broken down into energy end uses identified in the FOS; including predicted LENI, and energy use for catering, ICT and small power and external lighting; ; Outline of schedule of Automatic meter reading and reporting of headline data; energy use prediction for ICT server and hub rooms | |
| 4.2 | 1:200 plan and section for environmental strategy | including: ventilation, acoustics, heating and cooling; levels and critical room dimensions; e.g., cills, ceiling and floor levels |
| 4.3 | 1:50 cross section through typical classroom and adjacent circulation space | indicating the co-ordinated ventilation, heating and lighting strategies; showing: external wall, structure, co-ordinated services, floors, cills, soffit and roof with key dimensions |
| 4.4 | Up to 4 A1 drawings to include  NTS schematic drawing showing key services, control systems and zoning  NTS schematic drawing of metering | |
| 4.5 | Hot and cold water services strategy and NTS schematic diagram | including predicted hot water consumption; schematic proposed schedule of drinking water supplies |
| 4.6 | Fire safety strategy ( 2 sides A3) | |
| **5.0** | **ICT** | |
| 5.1 | ICT infrastructure [ and decant ] proposals (maximum length 10 sides A4, font size 11 point Arial) | |
| 5.2 | 1:200 ICT infrastructure plan, including broadband and telephony routing and positioning of server/hub rooms | |
| 5.3 | An agreed equipment schedule to support the ICT Infrastructure proposal. | |
| 5.4 | 1:50 drawing and details of the data and power provision on the standard ‘teacher wall’. (Referenced to response in 4.3) | |
| 5.5 | Server room plan showing data/server cabinet numbers and location, positioning of AC units and incoming services | |
| **6.0** | **FURNITURE AND EQUIPMENT LAYOUTS AND FINISHES SCHEDULES** | |
| 6.1 | 1:50 typical general teaching room/classroom cluster layout plan | Loose and fixed furniture and equipment, alternative classroom configurations |
| 6.2 | 1:50 typical design and technology suite layout (e.g. Resistant Materials) plan. (or other classroom type as specified by the Framework user) | showing both new and Legacy FF&E; loose and fixed furniture and equipment |
| 6.3 | 1:50 typical science suite layout plan | showing loose and fixed furniture and equipment. |
| 6.4 | 1:50 typical kitchen & server areas plan (see note 2) catering fit-out and equipment. |  |
| 6.5 | 1:50 Dining room layout (secondary). |  |
| 6.6 | A schedule and details of proposed internal materials, finishes and components | which provides a quality benchmark for the fixed furniture, floor, ceiling and wall finishes in all typical spaces. |
| 6.7 | A schedule and details of proposed external materials, finishes and components | which provides a quality benchmark for the structure and external envelope. |
| **7.0** | **CONSTRUCTION PHASING** |  |
| 7.1 | NTS annotated layout plans | To indicate construction phasing process required |

**PART 2: OVERALL APPROACH (Maximum 4 sides A4)**

1. Panel Members should outline their overall approach to developing the sample scheme from SPM through to planning and contract award to ensure continuity, capacity and capability of all resources. Your response should include a schedule of meetings, identifying who is required at each and a resources schedule to identify and confirm availability of both your internal and supply chain resources

**PART 3: DESIGN AND COST MANAGEMENT (Maximum 4 sides A4)**

1. Panel Members should describe how they will manage the design development process to finalise the detailed design and specification through the Selected Panel Member stage to contract award. Panel Members should identify any on-going project risks and issues and should describe how they will ensure their proposals, as included in the ITT submission, will be maintained and delivered

**PART 4: DESIGN SOLUTIONS AND VALUE FOR MONEY (Maximum 15 sides A4, to note page count excludes information required at part 1)**

1. The Framework User will carry out an overall assessment of the design solution**.** With reference to the drawn information required at section 1 Panel Members should summarise how their proposals have met the Authority Requirements in respect of:
   1. Masterplanning; making best use of the site
   2. School Grounds; making assets of outdoor space
   3. Spatial planning; clear, logical internal organisation
   4. External appearance; form, massing and materials
   5. Interiors; creating excellent spaces for teaching and learning
   6. Adaptability; catering for changing school needs
2. The Framework User will carry out an overall assessment of the environmental strategy/solution. Panel Members should produce an environmental strategy report ( as described in section 1) to outline the approach taken [to new and remodelled areas] in respect of:
   1. Heating, cooling and ventilation
   2. Acoustic strategy
   3. Daylight and lighting
   4. Energy and water management and efficiency
   5. Fire safety strategy
3. Panel Members should confirm there is no requirement to derogate from the Authority Requirements. Where Panel Members do require derogation these should be detailed in response to this question with a clear indication of the standard derogated from and to and as well as the full list of spaces affected and how the impact of any derogation is mitigated by their chosen solution. This response should include appropriate reference to the drawn information required at Part 1
4. Panel Members will outline their proposals for the ICT infrastructure [and decant of Legacy ICT equipment and assets] allowing the school to maintain the continuous and efficient delivery of its education and other functions
5. [Panel Members will outline their strategy for the use and decant of legacy FF&E allowing the school to maintain the continuous and efficient delivery of its education and other functions.]

**PART 5: CONTRACT MANAGEMENT AND HANDOVER (Maximum 2 sides A3 plus 5 sides A4)**

1. The Panel Member will provide a detailed programme from appointment as SPM to handover of the completed facility. The programme(s) should identify all key dates including design development, client approval meetings, and statutory consents, development, presentation, review and agreement of detailed contractors proposals, construction and handover dates
2. Panel Members will describe the approach to construction/refurbishment of the facility including a description of how any necessary phasing and decanting [including the decanting and commissioning of legacy ICT/Furniture/Equipment] is to be organised to minimise disruption to the school whilst achieving best value for money
3. Panel Members should describe in detail their management procedures for the handover of the works (including the decant and installation of the ICT and furniture and equipment requirements) and the provision of staff training to ensure continuity of education delivery

**PART 6: STAKEHOLDER MANAGEMENT AND CONTINUOUS IMPROVEMENT (Maximum 2 sides A4)**

1. Panel Members will identify who the key stakeholders for the scheme will be from SPM through to the end of defects and describe how they will manage their needs and expectations, including their approach to continuous improvement through the various stages.

**PART 7: PRICING (Maximum 4 sides A4) *in addition to Volume 6 schedules)***

**This section invites Panel Members to expand upon their capital and whole life costs schedules. Responses will be read in conjunction with those schedules as presented in Volume 6. Due consideration should be given to the Evaluation Matrix in completing this section.**

1. Panel Members must complete the Pricing Schedules provided in Volume 6 to set out the price for their proposal. This must show that their Bid is affordable within the overall funding envelope **(Pass/Fail)**
2. The Panel Members must ensure the pricing schedules contained in the Framework Agreement have been correctly applied to this project. Maximum rates cannot be exceeded but may be further discounted.

**Note to Panel Members:**

In evaluating question 7.2, a Panel Member who has applied the framework rates as expected will receive a score of 3 ‘as expected’. A mark of 4 or 5 will be allocated to reflect the consideration of any discount to framework rates as Good or Very Good as noted in Volume 8

1. By reference to the “cell” entitled Project Cost Total in the cost schedule, the Panel Member’s price should be the lowest compliant price to deliver the project

**Note to Panel Members:**

In evaluating question 7.3, the Panel Member with the lowest Total Project Cost will be awarded 10 marks. The other Panel Member shall be awarded marks on the following basis:

|  |  |
| --- | --- |
| **For Projects with funding envelope above £7.5M** | |
| **Percentage Range Over Lowest Total Project Cost Submission** | **Marks** |
| >0%-0.5% | 10 |
| >0.51% - 1.0% | 8 |
| 1.01% - 2.0% | 5 |
| 2.01% - 3% | 1 |
| > 3% | 0 |

|  |  |
| --- | --- |
| **For Projects with funding envelope below £7.5M** | |
| **Percentage Range Over Lowest Total Project Cost Submission** | **Marks** |
| 0% - 1% | 10 |
| 1.01% - 5% | 6 |
| 5% - 8% | 2 |
| > 8% | 0 |

1. [With reference to the pricing schedules contained in the Framework Agreement the Framework User will consider the impact of discounts offered against a batch value of [ ] comprising of [ ] schemes]

**Note to Panel Members: No response to 7.4 is required from Panel members**

In evaluating question 7.4, a Panel Member who has not included discounts in their framework schedules will receive a score of 3 ‘as expected’. A mark of 4 or 5 will reflect the consideration of the value of any discounts included in the framework agreement as Good or Very Good as noted in Volume 8

1. Panel Members will identify how they have utilised the funding allocated for Furniture and Equipment to ensure the Authority Requirements for FF&E have been met and, where possible, return capital funds to EFA or the Framework User
2. Panel Members will identify how they have addressed the specific site related issues to minimise the actual costs for abnormals .How have you developed your scheme proposals to return capital funds to the EFA or the Framework User
3. Panel Members should complete the lifecycle and facilities management costs included at Volume 6 and describe how their design approach will impact on life cycle and facilities management costs [to both new and refurbished areas] to ensure minimal energy consumption and life cycle replacement cost. Panel Members must clearly address how they have delivered the lowest Total Project Cost for the scheme without compromising life cycle replacement costs