

Framework Contract for Professional Services Related
to Construction



Invitation to Tender
Part A - Instructions and important information and
Part B - Specification

Framework Contract for Professional Services related to Construction

Contract Term – 4 years

Procurement portal ref: DN394759

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Oxford Direct Services (ODS) is made up of two companies that work together to deliver cost-effective public and commercial services. The Companies are owned by Oxford City Council who is the single shareholder.

Established in 2012, Oxford Direct Services was transformed into a wholly-owned social enterprise in 2018. Why? So that we can continue returning millions of pounds to the Council through the savings and returns generated from our commercial services. These savings and returns are used for core Council services, to offset cuts in Government grants and to create more jobs for the people of Oxfordshire.

We're committed to efficient and environmentally responsible services for all. And, with a city population of 152,000, 46,000 commuters and an estimated 9.5 million visitors a year, it's important that we continue to task reliable, experienced, local work forces with the job.

While the City Council is our largest customer as we empty bins, clean streets and maintain parks and properties, we provide important, customisable and innovative services to commercial businesses and organisations.

1. Scope

1.1 This Services Framework Contract is for eight Lots (see Appendix 1 for the contract structure).

1.2 The tender is also split into Lot tiers:

- Tier 1:
 - Lot 1 Lead Consultant
 - Lot 2 Project Manager
 - Lot 3 Principal Designer
- Tier 2:
 - Lot 4 Architect
 - Lot 5 Cost Consultant
 - Lot 6 Services Engineer
 - Lot 7 Structural Engineer
 - Lot 8 Planning & Master Planning

Tenderers may bid for one or more Lots.

Each Lot represents one framework contract

1.3 As a minimum, we expect Tenderers to respond with market leading pricing structures which reflect the scope of the commercial opportunities we offer. Additionally, where there is an opportunity for a sustainable solution, Tenderers are strongly encouraged to offer such solutions, where permitted within the scope of the specification.

1.4 It is anticipated that the Framework will consist of a maximum of 3 Suppliers per lot who will deliver both financial and efficiency benefits to ODS.

2. Contract period

- 2.1 This Contract is programmed to be awarded on a four year framework contract
- 2.2 The implementation date is programmed to be varied and denoted in the Mini-competitions that will be operated on the framework, with an expected start date of 30th April 2019.

3. Contract value

- 3.1 Unless otherwise disclosed in this Invitation to Tender, ODS will not disclose the budget it has for this Contract.
- 3.2 Tenderers are advised that under the Government's Transparency Agenda a certain amount of information about payments made, contracts held etc. is available on ODS's website. However, where such information exists ODS does not guarantee that this level of purchasing will continue in future, and is not to be taken as an indication of ODS's future level of spend in this area.

3.3 What is a Framework Contract

A Framework is a 4 year Contract, with one or more Suppliers. Once a new requirement for the Service is established ODS will contact all approved Suppliers (those who have been awarded a Contract on this Framework) use the attached mini competition form through the South East Portal with full details of the requirement. The Supplier shall then complete the Mini Competition and return through the portal. These responses will be evaluated and the winning Supplier will be notified.

3.4 Once part of the Framework

Once part of the Framework there is no obligation for ODS to offer works or for the Supplier to accept work. The ODS will send out a Mini Competition to all suitable approved Suppliers for all works required.

4. The basis of the Tenders

- 4.1 This Contract is being let in accordance with ODS's Procurement Policy with which the Successful Tenderer shall comply.
- 4.2 Tenderers must submit in accordance with the instructions contained within this Invitation to Tender. Any Tenderers that do not comply with these instructions may have their tender rejected.
- 4.3 Tenders are being invited to respond to a public advertisement. The Contract shall be in writing, in the form contained in this ITT, shall be signed within 28 days of the acceptance of the successful Tender.
- 4.4 The Tenderers written response to any information required by ODS will be taken into account in the evaluation of the Tender and if accepted, will be binding but will not detract from the Contract or Specification.
- 4.5 If the Successful Tenderer fails to execute the Contract ODS may (without prejudice to any other remedy available to it) terminate the Contract by notice to the Successful Tenderer having immediate effect.

- 4.6 Until the execution of the Contract, the successful Tender together with the ODS's written acceptance of it shall form a binding agreement between ODS and the Successful Tenderer.
- 4.7 Every Tender received by ODS shall be deemed to have been made subject to the enclosed Contract Terms and Conditions unless ODS shall previously have expressly agreed, in writing to the contrary. Any alternative Terms or Conditions offered on behalf of the Tenderers shall, if consistent with this Invitation to Tender be deemed rejected by ODS unless expressly accepted in writing.
- 4.8 Any express waiver or variation of any of the Contract Terms and Conditions made in writing by the ODS's Supervising Officer shall bind ODS. Otherwise, neither the Supervising Officer nor any other servant or agent of ODS has authority to vary or waive any of the Contract Terms and Conditions on behalf of ODS.
- 4.9 ODS reserves the right not to accept the lowest or any Tender, and to annul the procurement process and reject the Tenders (in whole or in part) at any time prior to Contract Award, without thereby incurring any liability to Tenderers. To be clear ODS reserves the right not to award any contract, at its sole discretion.
- 4.10 ODS reserves the right to negotiate on particular items of a Tender proposal whilst ensuring that such negotiation does not distort competition or differ from the scope of the Contract.
- 4.11 The Successful Tenderers shall undertake the day-to-day monitoring and supervision of the Contract. An officer appointed by ODS shall monitor the Tenderers quality control system to ensure compliance with the standards and requirements set out within this Invitation to Tender.
- 4.12 ODS will ensure that the requirements as set out in the Contract are appropriate to their needs, and are supplied in accordance with the Contract.
- 4.13 All prices are to be shown in pounds sterling and fixed for the entire Contract Term. Pricing will be fully inclusive of **all** costs involved in meeting the Specification including delivery or early settlement discount incentives.
- 4.14 ODS reserves the right to not to award a Contract to the Successful Tenderer where the Tenderer cannot meet the requirements to ODS's timescales and/or satisfaction.
- 4.15 All communication with ODS must be made via the South East Business Portal (procurement portal). <https://procontract.due-north.com>.
- 4.16 The indicative timetable for this procurement is:

| Stage/activity | Date |
|--|---|
| Invitation to tender published | 25th February 2019 |
| Deadline for receipt of clarification questions or request for additional information from Tenderers | 21 st March 2019 |
| Deadline for receipt of tenders | 29th March 2019 12 noon |
| Preferred Tenderers announced | 9th April 2019 |

| | |
|----------------------------|--|
| Standstill period | 9 th to 19 th April 2019 |
| Contract award | April 19 th 2019 |
| Contract commencement date | April 30 th 2019 |

5. Instructions to Tenderers

**PLEASE NOTE AS PER THE ABOVE TABLE TENDERS MUST BE RETURNED BY :
29th March 2019 by 12.00 noon**

5.1 Tenderers must observe the following requirements:

- (a) Tenderers have responsibility for obtaining, at their own expense, all information necessary for the proper preparation of their Tender. This responsibility extends to attending any site visits or necessary meetings throughout the entire procurement process;
- (b) information provided to Tenderers by ODS (whether within the Invitation to Tender or information released subsequently following the despatch of the Invitation to Tender) is provided only for guidance in the general preparation of the Tender. Tenderers must make their own enquiries with regard to the accuracy of any such information. No responsibility is accepted by ODS for any loss or damage of whatsoever kind and howsoever arising from the use of such information by Tenderer;
- (c) Each party shall bear their own legal and other fees in relation to the preparation and submission of the Tender and any formal Contract documents arising therefrom.
- (d) Tenderers shall not make any alterations, qualifications, additions or notes upon the text of the Contract Terms and Conditions except with the prior written consent of ODS. Any proposed amendments must be notified to ODS for consideration prior to Tender submission in accordance with paragraph 4.7 & 4.8 above;
- (e) Tenderers are required to keep the Tender open for acceptance for a period of 90 days from the date for submission of Tenders;
- (f) All documents requiring a signature must be signed as stated below and the status of the signatories within the organisation must be indicated;
 - (i) where the Tenderer is an individual, by that individual;
 - (ii) where the Tenderer is a partnership, by two duly authorised partners;
 - (iii) where the Tenderer is a company, by two directors, or by a director or a secretary of the Company, such persons being duly authorised for that purpose;
- (g) Should a Tenderer withdraw their Tender or fail to complete the Contract within 28 days of acceptance of a Tender, ODS will not, for a period of 3 years, accept any Tender from such Tenderer unless the appropriate committee specifically by resolution within this period directs otherwise.
- (h) No copies of any of the written documentation supplied by ODS may be made without the written consent of the ODS;

6. Tender queries

- 6.1 Tenderers should seek to clarify any outstanding queries and points of doubt with ODS before submitting a Tender.
- 6.2 All requests for clarification, additional information etc. must be made via the procurement portal <https://procontract.due-north.com>. So as to maintain the principle of the EU Treaty (transparency, equality and non-discrimination) ODS will not respond to any communication that is not received via the portal.

7. Completing the documentation

- 7.1 ODS reserves the right to disqualify any submission which is deemed incomplete.
- 7.2 Tenders which are not submitted in the format specified in this Invitation to tender shall not be considered by ODS.
- 7.3 Please answer all the questions in English, as accurately and concisely as possible, or mark those not applicable 'N/A' and provide an explanation.
- 7.4 Where indicated, responses must not exceed the maximum word or page limit given, appendices will be used as information only to add the understanding of the written response, an example of this may be screen shots of a system.
- 7.5 Please answer every question as instructed to do so. Do not assume that the officers evaluating the form will know about the Tenderers organisation or the work that they do, and answer the questions as fully as possible within any given constraints. ODS will only evaluate what is written by the Tenderers in their Tender.
- 7.6 Tenderers should not provide marketing literature or supporting documents, for example, accounts, certificates, statements or policies unless specifically requested to do so. Instead, we may request a statement regarding your approach to various aspects or a summary of your policies. ODS may ask to see these documents at a later stage so it is advisable that Tenderers ensure they can be made available upon request. Tenderers may also be asked to further clarify your answers or to provide more details.
- 7.7 Unless otherwise specified, tenders must be submitted using the forms provided, and in the format as issued (not PDF).
- 7.8 Where a signature is required this must be signed by a person who is authorised to do so as per paragraph 5.1 (f).
- 7.9 Tenderers must submit their Tender via the portal before the deadline <https://procontract.due-north.com>.

Tenders received after the deadline for receipt will not be considered.

8. Freedom of Information

- 8.1 Tenderers acknowledge that ODS is obliged under the Freedom of Information Act 2000 (FOIA) and the Environmental Information Regulations 2004 (EIR) to disclose information to third parties subject to certain exemptions. This includes the information given in relation to this Invitation to tender process.
- 8.2 Tenderers therefore accept and acknowledge that the decision to disclose information and the application of any exemptions will be at ODS's sole discretion. The Authority will act reasonably and proportionately in exercising its obligations under the FOIA and/or the EIR as to whether any exemptions under of the FOIA and/or EIR may be applied to protect the Tenderer's legitimate commercial and trade secrets.
- 8.3 Tenderers should state in the FOIA Disclosure form if any of the information supplied is confidential, or commercially sensitive, or should not be disclosed in response to a request for information under the FOIA or EIR. Tenderers should state why they consider the information to be confidential or commercially sensitive and the time period applicable to that sensitivity.
- 8.4 This will not guarantee that the information will not be disclosed but will be examined in the light of the exemptions provided in the FOIA and EIR.

9. Variant Tenders

- 9.1 Unless otherwise specified in the Contract Notice, ODS will not accept a variant tender.
- 9.2 Where a variant tender is invited, ODS will give an indication as to the nature of the variant tender that is authorised. In such instances, Tenderers must also submit a Tender which is fully compliant with the requirements set out in the Invitation to Tender (non-variant).

10. Abnormally low Tenders

- 10.1 Where the Tender price appears abnormally low, Tenderers will be required to explain and provide evidence to support the price and costs proposed in the tender.
- 10.2 In accordance with provisions contained in clause 69 of the Public Contracts Regulations 2015, ODS may reject a Tender deemed abnormally low.

11. Confidentiality of Tender information and documents

- 11.1 All information provided by ODS in connection with this Tender shall be regarded as confidential to ODS, except that such information may be disclosed for the purpose of obtaining sureties and quotations necessary for the preparation of the Tender.
- 11.2 The Invitation to Tender documentation are and shall remain the property of ODS and must be returned with the Tender submission or deleted from any computer systems

where it is downloaded. If Tenderers choose not to submit a Tender, the Tender documentation must be deleted.

- 11.3 The Tenderer shall treat the details of its Tender and any subsequent Contract as strictly private and confidential. Copyright in the tender documents is reserved to ODS.

12. Canvassing

- 12.1 Any Tenderer who directly or indirectly canvasses any member, officer or agent of ODS concerning the award of the Contract or who directly or indirectly obtains or attempts to obtain any information from any such member, officer or agent concerning any other Tender or proposed Tender shall be disqualified.

13. Collusive Tendering

- 13.1 Any Tenderer who:

- (a) refuses to complete the Anti Collusion and Code of Conduct Certificate, or
- (b) fixes or adjusts the amount of their Tender by or in accordance with any agreement or arrangements with any other person; or
- (c) communicates to any person other than ODS the amount or approximate amount of their proposed Tender (except where such disclosure is made in confidence in order to obtain quotations necessary for the preparation of the tender for insurance or contract guarantee bond); or
- (d) enters into any agreement or arrangement with any other person such other person shall refrain from tendering or as to the amount of any tender to be submitted; or
- (e) offers, or agrees to pay, or give, or does pay, or give any sum of money, inducement or valuable consideration directly or indirectly to any person for doing, or having done, or causing or having caused to be done in relation to any other tender or proposed tender for the Contract any act or omission;

shall (without prejudice to any other civil remedies available to ODS) be disqualified.

14. Tender warranties

- 14.1 In submitting a Tender the Tenderer warrants and represents that:

- (a) it has complied in all respects with the Invitation to Tender;
- (b) all information, representations and other matters of fact communicated (whether in writing or otherwise) to ODS by the Tenderer or its employees in connection with, or arising out of the Tender are true, complete and accurate in all respects;
- (c) it had made its own investigations and research, and has satisfied itself in respect of all matters relating to the Invitation to Tender and that it has not submitted the Tender and will not have entered into the Contract in reliance upon any information, representations or assumptions (whether made orally, in writing or otherwise) which may have been made by ODS;

- (d) it has full power and authority to enter into the Contract and will if requested produce evidence of such to ODS;
- (e) it is of sound financial standing and the Tenderer and its partners, officers and employees are not aware of any circumstances (other than such circumstances as may be disclosed in the accounts or other financial statements of the Tenderer which may adversely affect such financial standing in the future;

15. Ordering

- 15.1 ODS will send out a Mini Competition to all suitable approved Suppliers for all works required. On award of a mini competition the Successful Tenderer must be able to receive orders electronically.

16. Payment

- 16.1 Payment shall be made by ODS to the Successful Tenderer in accordance with the Specification and the Contract Terms and Conditions.
- 16.2 ODS does not permit payments being made in advance.

17. Tender evaluation

- 17.1 In evaluating the Tenders ODS shall be seeking to ensure that it secures the most economically advantageous means of the supply and procurement, that is to say, an appropriate level of quality of service delivery and financial performance from the Successful Tenderer as well as including continuous improvement.
- 17.2 ODS has determined the applicable financial and technical Contract evaluation criteria. In essence, Tenderers must demonstrate that they are technically and operationally competent and able to meet the Specification, as a minimum requirement, as well as offering a financially attractive package for ODS.
- 17.3 ODS considerations will include the merits and capacity of the Tenderer's services offered, to include the ability to fulfil the Contract Terms and Conditions and Specification requirements.
- 17.4 Tenderers should note that regardless of a Tenders overall merits, in the event that evaluating officers (acting reasonably) consider there to be a fundamental weakness which is likely to impact adversely upon the supply of the goods and/or services, then grounds will exist to exclude the Tender from further consideration.
- 17.5 Throughout the evaluation process, ODS reserves the right to seek clarifications from Tenderers, where this is considered necessary to achieve a complete understanding of the Tender received.
- 17.6 An initial examination of the Tender will be made to establish the completeness of the submitted Tender.
- 17.7 Tenderers may be asked to attend a clarification interview/presentation with ODS's evaluation panel. Where required, the purpose of the clarification interview/presentation will be to help clarify any points arising from the written Tenders

and scores may be adjusted as a result of the clarification interview/presentation. ODS reserves the right not to invite any Tenderer to clarification interview/presentation whose overall score is significantly lower than highest scoring Tenderers.

- 17.8 Where information or documentation to be submitted by Tenderers is or appears to be incomplete or erroneous, or where specific documents are missing, ODS may request the Tenderer concerned to submit, supplement, clarify or complete the relevant information or documentation within an appropriate time limit, provided that such requests are made in full compliance with the principles of equal treatment and transparency.
- 17.9 The evaluation process will consist of Tenderers being assessed against the selection criteria and grounds for exclusion, and award criteria. Tenders that meet the selection and grounds for exclusion criteria will be evaluated against the award criteria. ODS reserves the right to examine Tenders before completing the selection and grounds for exclusion assessment.
- 17.10 Tenderers will be evaluated using the selection and grounds for exclusion criteria listed below. Any Tenderer failing any section will not have their tender evaluated.

| Section | Assessment |
|---|-----------------------------------|
| Section 1: Tenderer information | Not scored, for information only* |
| Section 2: Grounds for Mandatory Exclusion | Pass / Fail |
| Section 3: Grounds for Discretionary Exclusion | Pass / Fail |
| Section 4: Economic and financial standing | Pass / Fail** |
| Section 5: Parent Guarantee | Not scored, for information only* |
| Section 6: Technical and Professional Ability (relevant experience and Contract examples) | Not scored, for information only^ |
| Section 7: Modern Slavery Act 2015 | Not scored, for information only* |
| Section 8.1: Insurance | Pass / Fail |
| Section 8.2: Skills and Apprentices | Not scored, for information only* |

* *Tenderer may be excluded on the grounds of providing insufficient or false information.*

** *Financial standing takes into consideration a Tenderers credit score, the estimated value of the Contract, and the Tenderers turnover. Any Tenderer who does not achieve a credit score of at least 81 and/or or whose minimum yearly turnover is not at least twice*

the estimated value of the Contract may be subjected to a more detailed assessment as to their financial standing. Any Tenderer who provides less than satisfactory accounts/figures or documentation which therefore give rise to concerns that cannot be satisfied regarding their financial standing, will fail. Credit scores are obtained via Experian.

Where the examples given are not relevant to the Contract (scope and Contract value), or where insufficient information is given, the Tenderer may be excluded.

17.11 ODS reserves the right to request a site visit to an existing customer of the Tenderer as part of the qualitative evaluation process. Where requested the site visit will be conducted after any clarification/presentation interview and will be attended by members of the evaluation panel and key business users. ODS anticipates that such site visits or references will only be conducted with/requested from the highest ranking Tenderers, and will be used only to clarify and verify their submissions.

17.12 The Award Criteria will be scored out of 100%, with Tenders evaluated on the following basis of the award sub-criteria and their weighting for the quality aspect of the tender. It is anticipated that Tenderers that successfully meet the total minimum percentage pass level for both quality and price of 80%, will be admitted to the Framework.

| Ref: | Award criteria | Weighting |
|-------------|---|------------------|
| 1. | Technical Ability to Service the Account | 20% |
| 2. | Evidence of Previous Work (2 case studies 7.5% each) | 15% |
| 3. | Staffing/Resourcing | 15% |
| 4. | Added Value/ Social Value | 10% |
| | Qualitative Total | 60% |
| | Price | 40% |
| | Overall Total | 100% |

17.13 The scoring framework shown below will be used to evaluate Tenders. The Tenderers response to each question will be scored and the total pro-rated to give a percentage score out of the maximum percentage for that section

| | |
|----------------------------|--|
| 0 Unacceptable | Nil response, or Proposal is so incomplete or irrelevant that it is not possible to form a judgement |
| 1 Poor | Almost unacceptable, response is limited or proposal is inadequate or substantially irrelevant. |
| 2 Unsatisfactory | Below expectation, proposal does not fully address the requirement and gives rise to a number of concerns about its potential reliability. |

| | |
|--------------------------|---|
| 3 Satisfactory | Satisfactory, proposal generally meets requirements, gives minor reservations about meeting some of the requirements. |
| 4 Good | Good, meets expectations, proposal provides detail that is directly relevant, gives confidence as to reliability to meeting all key aspects of the requirements. |
| 5 Excellent | Comprehensive, proposal exceeds expectations, gives high confidence that all key aspects of the proposal may be relied upon without reservation, offers added value and innovation that is relevant to requirement. |

17.14 The final scores for the qualitative and price elements of the Tender will be combined to give an overall final score for the submission.

17.15 With respect to financial criterion scoring each submission will be awarded a weighting based on its relationship with the lowest priced quotation on the basis of the submitted lump sum fee. The Tender with the lowest lump sum fee will be awarded the full weighting available. Each of the remaining Tenders will be awarded a weighting on a pro-rata basis according to the following calculation:

Lowest quotation price

_____ x 40 % of weighting to be allocated

Tenderer price

Worked example:

| Tenderer | Lump sum price (£) | Pro rata weighting (based on 40% being allocated to the price criteria) |
|----------|--------------------|---|
| A | £1,000,000 | 40% |
| B | £1,250,000 | 32% |
| C | £1,500,000 | 27% |

17.16 A placebo job will be applied to the calculation of each Lot involving the following;

8 hours applied at Director Level

16 hours applied at Senior Professional level

20 hours applied at Professional /Consultant level

15 hours applied at Assistant Consultant

10 hours Graduate/technician

6 hours Apprentice/Trainee/Undergraduate

18. Definitions

18.1 Words defined in this document shall have the same meaning throughout the Invitation to Tender:

| | |
|------------------------|---|
| “Contract” | means the Articles of Agreement, the Terms and Conditions, the Specification together with any relevant plans, drawings and any other documents referred to in the Contract schedules, as well as the Successful Tenderers Tender. |
| “Invitation to Tender” | means the documents that comprise the overall information pack sent to Tenderers for the purposes of submitting a Tender. The Invitation to Tender typically comprises the following documents: Instructions and important information Contract Terms and Conditions Specification Tenderers response to the Specification Pricing Schedule Form of Tender Confidential Information Statement Anti-collusion and Competition Code Certificate Anti-canvassing Certificate Freedom of Information Disclosure Statement |
| “Mini-Competition” | means the Mini Competition Tender documents issued to the Approved Suppliers once admitted onto the Framework to bid for supply of the Services. Appendix A |
| “ODS” | means Oxford Direct Services Ltd |
| “Specification” | means the document which sets out the ODS’s requirement in relation to the supplies/services/works and deliverables required |
| “Successful Tenderer” | means the Tenderer who achieves the greatest score following the evaluation process |
| “Tender” | means the Tenderers written proposal or bid for the proposed Contract |
| “Tenderer” | means the organisation submitting a Tender |

Statement of requirement

Introduction and Context

Oxford Direct Services (ODS) have a large amount of construction and re-development work for various local Councils and private developers.

Oxford Direct Services is a Teckal company to Oxford City Council and therefore works on behalf and is entirely owned by Oxford City Council.

There are a number of substantive growth programmes which are impacting the local economy and Councils. ODS are looking to shorten their procurement chain and have their own Construction Professional Services framework Contract which provides good value for money and helps the local economy.

Therefore ODS are looking for Suppliers that have capacity and can genuinely service the Oxfordshire area.

In each of the Lots in TIER 1 and TIER 2, ODS are looking to appoint potentially a maximum of three suppliers to enable mini-competitions to be conducted.

Specification

The primary roles and responsibilities as ODS see them;

THE TIER 1 jobs are listed in detail and would be called- off where ODS are looking to simplify the supply chain by having the ability to deal with a supplier(s) who can sub-contract large elements of the work.

THE TIER 2 jobs listed are larger specialist areas where ODS may seek to purchase or contract with an individual construction service such as architecture or planning as examples.

The Lead Consultant Lot 1

The Lead Consultant is the consultant that directs the work of the Consultant Team and is the main point of contact for communication between ODS and the Consultant Team, except for on significant design issues where the lead designer may become the main point of contact.

The Lead Consultant's role might include:

- Co-ordinating, monitoring and reviewing the work of the Consultant Team (and others, such as specialist designers and specialist contractors).
- Arranging Consultant Team meetings and planning work stages.
- Preparing programmes and progress reports.
- Seeking instructions from ODS.
- Advising ODS on the choice of procurement route.
- Advising ODS on the need to appoint additional advisers, consultants or specialist designers.

- Establishing change control procedures at key stages, for example when the project brief is frozen or when detailed design is frozen.
- Arranging value management exercises.
- Advising the client on the choice of contract and contract conditions.
- Assist the client in defining selection criteria for contractors and preparing pre-qualification questionnaires and tenders
- Co-ordinating the review of tenders.

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| Project Manager (Acts as though he were ODS, on site management by proxy) Lot 2 |
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The Project Manager may be appointed in order to:

- Help ODS develop their preliminary business case and initial strategic brief.
- Advise on the selection and appointment of the Consultant Team (and perhaps to manage the appointment process).
- Help ODS to organise themselves and identify the roles and responsibilities of client representatives, champions and user panels.
- Issue information and instructions on behalf of the ODS.
- Develop a project execution plan, including selection of procurement route and contracts.
- Contribute to risk management exercises.
- Contribute to value management exercises.
- Contribute to design reviews.
- Advise on the selection of contractors.
- Validate payments.
- Oversee change control procedures.
- Advise ODS on disputes.
- Monitor and assess overall client programmes and cost plans (which may include items beyond the scope of the main contract or Lead Consultants appointments).
- Advise on the transition from construction to occupation.
- Report to ODS

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|---|
| Lead /Principal Designer and Management (CDM) Co-ordinator 3 |
|---|

The Lead or Principle Designer (sometimes referred to as the design coordinator), directs and co-ordinates other designers in the Consultant Team as well as any specialist designers that are appointed. This role might include:

- Co-ordinating site surveys.
- Co-ordinate the preparation of information for the project brief.
- Co-ordinating the preparation of designs and specifications.
- Integrating different aspects of the design and their interfaces into the overall design.
- Co-ordinating internal and external consultations and design reviews.
- Defining the form and content of design information to be prepared.
- Reporting to ODS on design matters and seeking approvals.
- Co-ordinating the preparation of schedules of inspections, tests, mock ups and samples.
- Co-ordinating consultations, negotiations and submissions to planning authorities and other statutory and non- statutory authorities.
- Co-ordinating the preparation of tender documentation and reviewing submissions.

- Co-ordinating quality control systems.
- Co-ordinating the issue of production information to contractors and the review of designs prepared by contractors.
- Co-ordinating procedures for inspections, commissioning, testing and client training

Contractor services team, needed by ODS, that could be Sub-Contracted by the Lead Consultant

- Providing advice on setting up and defining the project.
- Developing and co-ordinating the design.
- Preparing production information and tender documentation.
- Contract administration.
- Inspecting the work of contractors.

The members of the Consultant Team that are likely to be required on most projects are:

- Architect.
- Cost consultant.
- Services engineer.
- Structural engineer.

Other consultants who might be required on some projects include:

- Access consultant.
- Acoustic consultant.
- Approved inspector (for building regulations approvals).
- Archaeologist.
- Business management consultant.
- Chartered environmentalist.
- Client design adviser.
- Client's representative.
- Civil engineer.
- Construction manager.
- Consulting engineer.
- Contract administrator.
- Ecologist.
- Employer's agent.
- Employer's BIM adviser.
- Environmental consultant.
- Facilities manager.
- Fire engineering consultant.
- Furniture, fixtures and equipment (FF&E) consultant.
- Health and safety consultant.
- Information and communications technology (ICT) consultant.
- Interior designer.
- Landscape architect.
- Local consultants with specialist knowledge of local procedures, culture, and so on.
- Lighting designer.
- Management contractor.
- Master planner.
- Party wall surveyor.
- Planning consultant.

- Programme consultant.
- Public health consultant.
- Rights of light surveyor.
- Security consultant.
- Site inspector (clerk of works).
- Specialist contractor.
- Structural waterproofing consultant.
- Surveyor.
- Transport/traffic engineer.

TIER 1 Roles

Lot 1 Lead Consultant required to :

- Act as Lead Consultant and manage other subcontractors
- Liaise with ODS, legal and project teams
- Manage sub-consultants where required across all services
- Provide collateral warranties and assignments where appropriate
- Observe Health and Safety Statutory requirements
- Application of environmentally sustainable practices
- Review ODS brief to assess compliance with desired outcome
- Provide a full range of archaeological services
- Provide General Technical advice associated with the build

Lot 2 Project Manager required to:

- Management of teams/sub-consultants
- Construction project and programme management
- Supervision of cost control – QS work, management and advice
- Risk management
- Design management
- Contract administration (selection of appropriate terms with ODS)
- Procurement advice for the construction phase
- Contingency management
- Life cycle costing

Lot 3 Principal Designer and Management (CDM) Co-ordinator required to provide:

- Liaison with HSE
- Ensure compliance of design and designers with CDM regs
- Provide pre-construction information to designers , the principal contractor and others
- Prepare and review Health and Safety file
- Safety inspections
- Risk assessment.

TIER 2 Roles and responsibilities

Lot 4 Architecture (all services up to RIBA stage 8) required to provide;

- Appraisal
- Briefing
- Outline/detail/final design proposals
- Contract documentation and administration
- New build and refurbishment
- Urban design
- BIM 3D modelling
- Breeam and energy rating design
- Heritage/Conservation work
- Design audit

Lot 5 Cost Consultant required to provide;

- Cost control – QS work, advice and managing all aspects of the contractual and financial side of construction projects. Quantity surveyors to manage all the costs on a construction project.

Lot 6 Services Engineering required to provide information to ODS on;

- Highways and infrastructure
- Traffic and transport
- Utilities
- Geotechnical
- Topographic Surveys
- Flooding
- Demolition
- Sewers and drainage
- Hydrology
- Land remediation
- Environmental
- Asbestos
- Surveys for construction projects
- Sample analysis, Air testing

Lot 7 Structural Engineering required to provide to provide information to ODS on;

- Highways and infrastructure
- Traffic and transport
- Utilities
- Geotechnical
- Topographic Surveys

- Flooding
- Structural
- Demolition
- Hydrology
- Land remediation
- Rail
- Environmental
- Asbestos
- Surveys for construction projects
- Sample analysis, Air testing

Lot 8 Planning & Master Planning Required to provide

- Town and Country Planning
- Liaison with planning Authorities
- Site appraisal
- Development strategies
- Development briefs
- Regeneration strategy
- Section 106 agreements
- Expert witness advice

Master Planning required to provide

- Illustrations and briefing documents
- Social, economic ,statutory and financial issues
- Advising on development proposals

Please note a detailed mutually prepared brief with expected timings and service level will be issued with each draw down arrangement.

END OF SPECIFICATION.