



Invitation to Tender

Evaluation Model and Questions

For the Procurement of Ryelands Re Roofing Phase 2 for Lancaster City Council

Ref0442.....

Tenderer

Tender Return Date - 12 noon 6th May 2024

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DRAFT TIMETABLE

The dates given below are indicative and may be subject to change.

Target Dates	Activity
As chest	Publish Opportunity
Noon 06/05/2024	Return of tender documents via the procurement portal only

COUNCIL NAMED CONTACT POINT

The Council's named contact point for the procurement is: Danny Howard (via The Chest)

Lancaster City Council
Lancaster Town Hall
Dalton Square
Lancaster
LA1 1PJ

ARRANGEMENTS FOR SITE VISITS

To arrange a site visit please feel free to visit the estate at anytime during the working day. If you require access to any other areas please contact D Howard via the chest.

EVALUATION CRITERIA AND METHODOLOGY

In the first instance the Price element of the assessment will be carried out. In order to maximise the Council's resources any weighted price submission which when added to the maximum available weighting for quality falls below that of the supplier awarded the maximum for price will be excluded from the quality evaluation.

A number of sub-criteria for the quality weighting will be used together with the price submitted for the works in order to determine who will be awarded the contract.

Any deviations or minor changes to the contract specification may be considered acceptable during the evaluation process, if it can be demonstrated that such a change has a clear benefit to the council. Acceptance of any changes will be at the council's discretion.

It is important that the correct format for the completion of the schedule is followed.

The criteria will enable the Council to identify the applicants who in the opinion of Officers offers best value for money to the Council.

The award criteria is based on value for money issues and the applicants' technical submissions as listed below.

The Council reserves the right to clarify any of the information provided.

The information will be scored in accordance with the principles set out below.

Evaluation Matrix for Invitation to Tender Process	Score	Mark Awarded
Quality	30%	
Social Value	1010%%	
Price	60%	

Figure 1 - Evaluation Matrix for Invitation to Tender Process

The Council reserves the right to reject a tender should the price be abnormally low. All other tenders will be evaluated using the following criteria.

The lowest price (LP) is awarded the maximum weighted score, each subsequent submission will be scored by taking the additional cost over and above the LP as a percentage of the LP, then deducted from the score of 100, then nominalised to the weighting score (WS).

For clarification the Council will use two decimal points for evaluation scores.

The Council may disregard any bid that is more than a 30% variation in price from the mean of all tenders received for this Contract

Figure 2 – Principles for the evaluation of quality

Listed below is the scoring model for the scoring principles for each element of the qualitative selection criteria.

Score	Scoring Principles
0	Rejected – Evidence is unacceptable or non-existent, or there is a failure to properly address any issues.
1 - 3	Poor – The evidence is deficient in certain areas where the details of relevant evidence require the reviewer to make assumptions.
4 - 6	Satisfactory – The evidence is acceptable, but with some minor reservations. The response deals only with processes and little output evidence is provided.
7 - 8	Good – The standard of evidence fully meets expectations.
9 - 10	Outstanding – The standard of evidence exceeds expectations. The response demonstrates clear and strong evidence of delivery as part of an integrated team and how this has become part of a continuous improvement process.

Figure 3 – Principles for Evaluating Proposals

The evaluators will use the following scoring model for the quality assessment.

Scoring Checklist for Tender Submissions				
Quality & Experience Evaluation		Marks out of 10	Weighting	Weighted Scores
1	Project Management including company profile – staff resources and how the contract is intended to be managed.		25	
2	Advise approach to Tenant Liaison, Customer Satisfaction and processes to reduce / resolve with tenant complaints.		20	
3	Advise approach for quality assurance and how this will be managed.		30	
4	H & S policies and documents relating to the works in hand (no generic copied risk assessments). Include any relevant accreditations		25	
			100.00%	Normalise to 30%
Social Value Evaluation				
4	Provided by Social Value Portal		10	
			100.00%	Normalise to 10%
Financial Evaluation				
8	Price		100.00%	Normalise to 60%

Figure 4 – Headline Scoring Model

Principles for the evaluation of Social Value

Standard wording to be included in Invitation to Tender documents when using the Social Value Portal.

Please note that the reference in red will be supplied when the project set up form has been submitted and the project created on the system.

The council's Contract Procedure Rules and Procurement Strategy now include the requirement for Social Value and Local Wealth Building to be included in any procurement exercise. There is a requirement that should an opportunity be expected to exceed a certain price threshold then Social Value will be included in the evaluation criteria. In order to provide a consistent application of requirements the city council has approved the use of The National Themes, Outcomes and Measures (TOMs) Social Value Measurement Framework – an open source and free to use mechanism designed for organisations that want to embed social value into their procurement or measurement activities and it aims to create practical ways to unlock more social value for communities.

The TOMs are a core set of measures. Each of these measures has specific Measurement units, financial proxy values as well as notes that will be required at management and measurement stage. The financial proxies allow the council to monetise each measure.

If you do not already have an account on the Social Value Portal you will be required to set one up.

<https://app.socialvalueportal.com/s/supplierregistration?svpprojectid=SI0-0000-01DTR>

Please refer to “The Social Value Portal – guidance for Bidders” and register your information using the project reference formatted as **SI0-0000-01DTR**

Review the definitions, Units and Evidence Requirements for the Measures you can deliver, to make sure you can deliver and evidence social value.

The “local area” in this instance means the Lancaster District local Authority area.

Make a reasoned commitment against the measures included in the Social Value Portal tool. The monetised value of your social value offer will be assessed in relation to the monetised offer from other bidders.

Bidders should note that social Value outcomes will be regarded as Key Performance Indicators for the purpose of contract performance. Failure to provide the outcomes offered and / or provide evidence that the offered service has taken place to adequate quality standards may result in a contract penalty.

Lancaster City Council reserve the right not to award all or any of the business to the best scoring Service Provider or to any Service Provider.

During the evaluation period, Lancaster City Council reserve the right to request or to seek clarification, in writing or by means of a clarification meeting, with any or all of the Bidders.

Where a bidder has made an error in a quotation submission Lancaster City Council may ask the bidder to confirm or withdraw their tender. However, where a bidder has made a visible and genuine arithmetical error they may be given the opportunity to correct the error.

INSTRUCTIONS FOR COMPLETION

Recipients are invited to complete their tender submission and provide any supporting information requested, to the Council via The Chest supplier portal, by the due date for return in accordance with the procedures set out in the paragraph below entitled “Submission of Completed Tenders” and following the prescribed format.

Tenderers are advised neither to make any assumptions about their past supplier relationships with the Council, nor to assume that such prior business relationships will be considered in the evaluation procedure unless explicitly stated.

The Council will not reimburse any costs incurred in connection with preparation and submission of responses to this tender. The Council reserves the right to terminate this tender process at any time and under no circumstances shall the Council incur any liability in respect of this tender or any supporting documentation.

Any canvassing – direct or indirect - of any Councillor or employee may result in disqualification.

Contractual Terms

The terms for this contract will be under the JCT minor works 2016

Queries about the procurement

If the Council considers any question or request for clarification to be of material significance, both the question and the response will be communicated, in a suitably anonymous form, to all potential development partners who have responded.

All responses received and any communication from potential development partners will be treated in confidence but will be subject to this paragraph.

Consortia, retained contractors and sub-contracting

Where a consortium or sub-contracting approach is proposed, all information requested should be given in respect of the proposed prime contractor or consortium leader.

Relevant information should also be provided in respect of consortium members, retained contractors or sub-contractors who will play a significant role in the delivery of services or products under any ensuing contract.

The Council recognises that arrangements in relation to consortia, retained contractors and subcontracting may be subject to future change. Service providers/suppliers should therefore respond in the light of such arrangements as are currently envisaged.

Potential development partners are reminded that any future change in relation to consortia, retained contractors and sub-contracting must be notified to the Council so that it can make a further assessment by applying the selection criteria to the new information provided.

Details should also be provided in relation to the proportion of any contract awarded that the potential development partner proposes to subcontract.

Lancaster City Council is committed to the prompt payment code and therefore expects that any subcontractors or suppliers will be paid with 30 days from receipt of invoice. Failure to pay in 30 days may result in the Council withdrawing payment from the main contractor.

Contact Point

Potential contractors are asked to ensure that the single point of contact nominated on The Chest is maintained as this will be the chosen method of contact with tenderers. The Council will not be responsible for contacting the potential development partner through any route other than the nominated contact via The Chest.

Freedom of Information

In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA'), all information submitted to the Council may be disclosed in response to a request made pursuant to the FoIA.

In respect of any information submitted by a potential development partner that it considers commercially sensitive the potential development partner should;

1. clearly identify such information as commercially sensitive;
2. explain the potential implications of disclosure of such information; and
3. provide an estimate of the period of time during which the potential development partner believes that such information will remain commercially sensitive;
4. please submit responses to 1, 2 or 3 above as an Annex with the completed tender.

Where a potential development partners identifies information as commercially sensitive, the Council will endeavour to maintain confidentiality. Potential development partners should note, however, that, even where information is identified as commercially sensitive, the Council might be required to disclose such information in accordance with the FoIA. Accordingly, the Council cannot guarantee that any information marked 'commercially sensitive' will not be disclosed.

Submission of completed tenders

Submissions will only be accepted via the supplier portal, The Chest. Should any tenderer have any problems with the system they must in the first instance contact Due North (contact details available on the home page).

EVALUATION QUALITY CRITERIA

The Evaluation will be carried out and will be assessed with specific regard for the listed sub criteria, use additional sheets if required.

Project Management including company profile – staff resources and how the contract is intended to be managed.
Advise approach to Tenant Liaison and Customer Satisfaction and processes to reduce / deal with tenant complaints
Advise approach for quality assurance and how managed
H & S Policies and documents relating to the works in hand (no generic copied risk assessments) include any accreditations

RETURNABLE FORMS

Undertaking

When you have completed the Invitation to Tender, please ensure that:

1. You have answered all the questions.
2. You have provided all documents requested.
3. You have read and signed the undertaking below.

I / We certify that the information supplied regarding the Organisation is accurate to the best of my knowledge and that I accept the conditions and undertakings requested in the invitation to tender. I / We understand and accept that false information could result in rejection of the application to be selected to take part in the tender process.

I / We also understand that it is a criminal offence, punishable by imprisonment, to give or offer any gift or consideration whatsoever as an inducement or reward to any servant of a public body. I / We also understand that any such action will result in rejection of our application to take part in the tender procedure and empower the Council to cancel any contract currently in force.

I / We understand and agree that if our tender is successful that the Organisation will purchase professional indemnity insurance as required if such insurance is not already held.

NB This undertaking is to be signed by a Partner, Director or authorised representative i.e. in their name on behalf of the Organisation.

Signed for and on behalf of the Organisation:	
Signed:	
Position/Status in the Organisation:	
Organisation's name:	
Organisation's address:	
Date:	

CONTRACT FOR - Ryelands Phase 2 Re roofing Works

Tender Declaration

Name and Address of Tenderer	
Telephone Number	
E-mail	

I / We agree that the insertion by me/us of any conditions qualifying this tender or any unauthorised alteration of any of the tender documents shall not affect the requirements of the specification and may cause the tender to be rejected.

I / We agree that this tender shall remain open to be accepted or not by the Council and shall not be withdrawn for a period of six months from the date of tender submission.

1. Unless and until a formal agreement is prepared and executed this tender together with your acceptance thereof in writing shall constitute a binding contract between us.
2. I / We certify that the details of this tender have not been communicated to any other person or adjusted in accordance with any agreement or arrangement with any other person.
3. I / We understand that you are not bound to accept the lowest or any tender you may receive.
4. I / We certify that this is a bona fide tender.

Signature(s)_____ **(print in full)**_____

Position in Organisation _____

Declaration of Non-Collusion

To: Lancaster City Council

Reference: 0442 Ryelands Phase 2 Re roofing Works

The essence of open tendering is that the Council shall receive bona fide competitive tenders from all firms tendering. In recognition of this principle, I / We certify that this is a bona fide tender, intended to be competitive and that I / We have not and will not (either personally or by anyone on my / our behalf):

1. Fix or adjust the amount of the tender (or the rate and prices quoted) by agreement with any other person.
2. Communicate to anyone, other than the person calling for this tender, the amount or approximate amount or terms of the proposed tender (except other than in confidence, where essential to obtain professional advice or insurance premium quotations required for the preparation of the tender).
3. Enter into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount or terms of any tenders to be submitted.
4. Canvass or solicit any Member, officer or other employee of the Council in connection with the award of this or any other Council contract or tender.
5. Offer, give or agree to give any inducement or reward in respect of this or any other Council contract or tender.

Dated	
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Name	
Position held	
Address of Tenderer	
Signature	