Commercial Estates

Pathfinder House

St Mary’s Street,

Huntingdon

PE29 3TN

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23 December 2021

**Tender**

**For Condition Surveys and Planned Preventative Maintenance (PPM) reports**

**Overview and objective**

The Council is looking to appoint a suitably qualified and experienced building surveyor or consultancy to produce detailed condition surveys across various commercial buildings and sites in its district (value c £70m) and provide prioritised and costed Planned Preventative Maintenance (PPM) reports to bring the properties up to good statutory and lease compliant standard.

As well as providing a comprehensive PPM report, the results will also be used to as part of a wider asset management plan for each site helping to form view whether to retain, invest or dispose

The list of sites is set out on the attached table with the report to be provided in a format to be agreed.

**Timeline**

|  |  |
| --- | --- |
| **STAGE** | **DATE** |
| **Issue Invitation to Quote** | **23 December 2021** |
| **Closing Date for Submission of Quotes** | **24 January 2022 (1200 hours)** |
| **Quote Assessment** | **27 January 2022** |
| **Contract Award Confirmation** | **31 January 2022** |

**Scope of Requirement**

Generally, the surveys will be non-intrusive, but will identify the need to undertake any further investigation or tests if appropriate. The need for any further surveys or tests will be highlighted in the condition survey. Any work identified requiring immediate action will be reported to the Project Manager for action and confirmed in writing, e.g., hazardous asbestos, potentially lethal mechanical/electrical services, etc

The purpose of the survey is to accurately assess the condition of the Council’s commercial estate building stock and repairing liability, the Council is looking to appoint a suitably qualified consultant to:

1. Carry out an initial desktop exercise to validate respective repairing responsibilities between the Council (as landlord whether directly or via service charge recovery); the Tenant; or silent., copy leases/title will be provided.
2. Undertake physical site surveys of the council’s commercial estate to include:
   1. Built fabric – internal and external
   2. External areas – yards, circulation, access areas, boundaries
   3. Visual report on M & E plant in situ – age, condition and recommendation on further reports required if warranted together with

Recommendations if further specialist reports are required.

3. Report on occupiers’ compliance with statutory requirements e.g. health and safety file

The surveyor/consultant will be responsible for arranging access to complete the report within the agreed timescales

4. The survey should reference the component parts of the buildings and sites identifying:

1. Repairing and maintenance responsibility – Landlord/tenant/ silent
2. Condition using a coding system (traffic light/numbers/letters) - Sufficient descriptive information and photos will be recorded to enable the location of the identified items and the proposed nature of remedial work to be undertaken.
3. Provision of a plan identifying the location of each item
4. Estimated costs for PPM per item will be identified to bring the particular element up to prevailing standard. Costs will include preliminaries, preambles, contingencies, site access, specific site requirements to undertake the works, professional fees, but not VAT. Costings will be produced using a recognised schedule of rates.
5. Priority for attention using a coding system e.g., 1. H & S/statutory requirement requiring immediate attention. 2. Requires attention 1-3 years, 3. Requires attention 3-5 years, 4. Requires attention 5-10 years or similar.
6. Expected remaining economic life of each building and element
7. Summary description of condition – identifying main items of concern and allowing summary costs to be viewed across the whole site/portfolio
8. Detailed condition report with photos and recommendations to be provided per property/site
9. (as part of the wider asset plan), if buildings are at / nearing the end of their economic life, whether there are any particular aspects that should be considered as part of a redevelopment (e. g. obvious ground conditions, ‘unusual’ construction methods etc
10. The work should reference statutory responsibilities as owner/occupier / H&S matters – and identify the responsible party ( as No 1 above)
11. Reports will be provided for each site as well as summary reports for the whole portfolio; allowing filtering by different categories, data to be provided in spreadsheet format or similar. All formats to be agreed prior to work commencing with the Council.
12. Provision or reports to be in a format that is compatible with upload to CAFM system

**The Council would like the following additional services to be costed as optional:**

*Provision of building reinstatement costs on a day one basis for buildings/sites where the Council are responsible for insuring. Provision of a measured survey for each unit/building*

*On a site by site basis, PPM reports for the ‘Part 2 Additional Sites’ shown at the bottom of the table*

*As part of the costing exercise please specifically highlight the cost to check lease repairing responsibilities – as this aspect may be carried out internally and summary information provided to the appointed contractor instead.*

**Access**

The surveyor will allow for physical access to flat roofs and access to eaves level to allow visual inspection of pitched areas, valleys, hips etc where: -

1. Access is within a vertical height 3 metres of the general ground level

2. Fixed permanent access is available e.g. external or internal stairs/ladder access.

3. Consideration will be given to drone surveys Project Manager reserves the right to add or omit properties indicated in the tender documents on the following basis: -

1. Strategic, acquisitions or disposals, closure or change of use etc

2. Performance of the selected Contractor to the approved programme

3. Failure against the agreed programme of survey returns may lead to a partial reallocation of sites to other firms.

**Asbestos**

The Council will provide information it holds on asbestos at each site. In view of this the successful tenderer will ensure all surveyors/inspectors receive adequate asbestos awareness training prior to commencing surveys, written evidence of training will be required by the Contract Administrator.

**Site Rules**

The successful tenders will ensure that the following site rules are adhered:

1. Surveys to commence only after appointments have been arranged

2. Surveyors to wear company ID at all times while on site.

3. Surveyors/engineers to report to reception/main office when arriving and leaving site.

4. Local site rules to be adhered to i.e., some sites may require visitor passes to be worn.

5. Ladders and equipment not to be left unattended.

6. Secure areas open for inspection not to be left unattended e.g., boiler houses, plant rooms, external security doors, gates etc.

7. Use of site owned equipment such as steps, ladders etc not permitted.

If you would be interested in providing a quotation to advise the Council, please provide the following:

**Selection Criteria**

The following are the minimum requirements to be met or appropriate action taken to meet:

* RICS regulated firm
* Maintain employer’s liability insurance of at least £5m
* Maintain Public liability insurance of at least £ 5m
* Maintain PI cover of at least £5m
* Clear GDPR policy and processes to ensure client and tenant records are safeguarded.
* H & S policy

1. Evidence of successfully undertaking surveys / PPM reports of this nature across multiple sites -for public and / or private sector clients. This experience should detail the work undertaken by the firm and the individuals (and their qualifications) who will be undertaking the work. This should include evidence of on-going and regular work of this nature for a variety of clients rather than the occasional ‘one-off’ instruction.
2. Names of 3 client organisations for whom you have carried out similar work. These may be contacted for references.
3. It is expected as part of the tender process, that a sample report will be provided as well as an anticipated timescale to carry out and complete this exercise.

**Evaluation**

1. The contract will be awarded to the tender that most closely meets the specification and evidences experience at the most economically advantageous cost and timescales in accordance with the following criteria

|  |  |  |  |
| --- | --- | --- | --- |
| **Criteria** | **Evidence** | **Pass** | **Fail** |
| Contractor Details | Completed Form |  |  |
| Quote Certificate | Signed Certificate |  |  |
| All Questions | Answers received against all asked questions in the RFQ |  |  |
| Company financial viability | 3 years of trading accounts – showing more than £50k turnover |  |  |
| Insurance | Adequate insurance policy covers |  |  |
| Health and Safety | Health and Safety records for the last 3 years/ appropriate policies |  |  |
| Relevant Experience | 1.Details of previous/ similar projects |  |  |
| GDPR and Data Protection | Policies and Processes |  |  |
| Price Schedule | 1.Fee |  | 40% |
| Quality | 1.Methodology Statement  2.Service Delivery & timescales  3.Case Studies and references  4. Sample report  5. Social Value |  | 60% |

**Freedom of Information Act 2000 / General Data Protection Regulation**

We will treat your quote as confidential, but we are subject to the Freedom of Information Act 2000 and the decision to disclose any information will be the Council’s sole decision. The General Data Protection Regulation (Regulation (EU) 2016/679) determines how personal data is treated by councils and contractors alike. Our procurement privacy notice can be found as an attachment at: [Procurement Privacy Notice](http://www.huntingdonshire.gov.uk/business/business-opportunities/)

Quotes must arrive by **1200 hours 24 January 2022**. Late quotes will be rejected - the tendering system (Pro Contract) will stop quotes or any other document being submitted after the deadline - No quote will be accepted if it is received after any of the other supplier’s tenders have been opened. Quotes must **not** be sent by email; they will be rejected.

All tenderers shall be notified of the outcome. Acceptance of the tender by the Council will be in writing.

Please carefully consider the declarations required in the Tender Certificate; any misleading or false declaration (unintentional or otherwise) may result in rejection of the tender or termination of any subsequent contract.

Please complete the pricing schedule, supplier details and Tender Certificate and return with details of the product, how it meets our requirement and complies with the specification.

Quotes must be returned via the **Pro Contract Portal** prior to the deadline. Any late submissions will not be evaluated.

**Terms & Conditions**

The Council’s Contract Terms are available at

<http://www.huntingdonshire.gov.uk/media/1377/standard-terms-and-conditions.pdf>

This is the Council’s preferred contractual base for the supply. Any queries about any terms should be raised and agreed with the Authorised Officer prior to quotation submission.

Suppliers must not undertake work until they have received an official Council Purchase Order form and written notification that they have been awarded the contract and are required to start work. The order will be subject to the Council’s Standard Terms and Conditions.

Yours sincerely

Ian Lademan BSc MRICS

Estates Surveyor (Interim)

Pathfinder House, St Mary's Street

Huntingdon PE29 3TN

M: 07523 943742

E: [ian.lademan@huntingdonshire.gov.uk](mailto:ian.lademan@huntingdonshire.gov.uk)

[http://www.huntingdonshire.gov.uk](http://www.huntingdonshire.gov.uk/)

Enclosures:

Specification

Table of Sites

Quote Instructions

Contractor’s Details

Suitability Assessment

*To be completed & returned by the bidder.*

Method Statement / Questions

Price Schedule

Quote Certificate

**Specification**

**Programme and timescales**

The Council are seeking to appoint an agent in with the aim of having a detailed report provided during **March 2022.**

**Quote Instructions**

* This request for quotation does not constitute an offer and the Council does not undertake to accept any quote or offer.
* The Council reserves the right to accept any part of any quote or offer. The Council will not reimburse any RFQ costs.
* Suppliers shall not discuss the quote they intend to make other than with professional advisers or joint bidders who need to be consulted.
* Quotes shall not be canvassed for acceptance or discussed with the media or any other supplier or member or officer of the Council.
* All quotes received shall be unconditional offers.
* Qualified quotes may be rejected. The Council’s decision as to whether or not a quote is in an acceptable form will be final.
* A supplier may submit a modified or alternative quote and the alternative may or may not be considered by the evaluating officer.
* Any modified or alternative quote must be free of qualifications. Any deviations from the specification and all risks, costs and contingencies must be identified.
* Suppliers are responsible for all information necessary for the preparation of their quotation.
* Information supplied to suppliers by the Council’s staff or contained in the Council’s publications is supplied only for general guidance in the preparation of the RFQ.
* Suppliers must satisfy themselves as to the accuracy of any such information and no responsibility is accepted by the Council for any loss or damage of whatever kind and howsoever caused arising from the use by suppliers of such information.
* Quotes must be returned via Pro Contract Portal ONLY.
* Ensure all necessary documents are enclosed:
  + Contractor Details
  + Suitability Assessment
  + Method Statement / Questions
  + Price schedule
  + Quote certificate:

Contractor Details (*to be completed by Contractor*)

|  |  |  |
| --- | --- | --- |
| 1. | Company / Applicant Details |  |
| 1.1 | Trading Name of the Organisation **submitting this Application Form**: |  |
| 1.2 | Contact name for enquiries about this bid: |  |
| 1.3 | Contact position (Job Title): |  |
| 1.4 | Address: |  |
| Postcode: |  |
| 1.5 | Telephone Number(s): |  |
| 1.6 | Fax Number: |  |
| 1.7 | E-mail addresses: |  |
| 1.8 | Website address (if any): |  |
| 1.9 | Registered Name of Organisation **submitting this application**: |  |
| 1.10 | Registered Address: |  |
| Postcode: |  |
| 1.11 | Company Registration No: |  |
| 1.12 | SME? (500 or less employees) | YES / NO (delete as applicable) |
| 1.13 | Are you a charity / voluntary / community sector organisation? |  |
| 1.14 | Registration Number and/or Date of Formation: (if applicable) |  |
| 1.16 | VAT Registration Number: |  |

**Suitability Assessment**

Note:

All questions are pass/fail questions; your tender may be rejected without any further consideration. Likewise, poor or limited evidence of relevant experience (Question 3) may result in rejection of your tender. Note: we may choose to ask the customer organisations listed in Question 3 for references.

Do not send documents at this stage, but later in the process we will require proof. Failure to provide timely information when requested or any discrepancy between the information provided and the answers below will result in disqualification.

In all cases it is the Evaluation Panel’s sole decision whether or not the answer/information provided is acceptable.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. | **Economic Standing** | | | |
|  | Is your turnover greater than £50000? | | | Yes / No |
|  | | | | |
| 2. | **Insurance** | | | |
|  | Do you have the following insurances in place (or able to obtain at normal commercial rates and within the price of this tender)?  Public Liability insurance of £5 million?  Professional Indemnity insurance of £5 million?  Employers’ liability insurance of £5 million? | | | Yes / No  Yes / No  Yes / No |
|  | | | | |
| 3. | **Relevant Experience** | **1** | **2** | **3** |
|  | Name of customer organisation |  |  |  |
|  | Name of the organisation which signed the contract with the customer organisation |  |  |  |
|  | Point of contact in customer organisation  Position in the organisation  E-mail address |  |  |  |
|  | Contract start date  Duration of instruction  Estimated Contract Value in total |  |  |  |
|  | Please describe the contract and how its performance demonstrates the technical capabilities needed to perform the requirements for this contract. |  |  |  |
|  | If you intend to subcontract any part of the contract, please explain how you will manage your subcontractors. Give evidence of how you will ensure timely delivery, performance and quality? |  |  |  |
|  | | | | |
| 4. | **Health & Safety policy** | | | |
|  | Do you have a current Health and Safety policy? | | | Yes / No |
|  | | | | |
| 5. | **GDPR and Data protection** | | | |
|  | Do you have a GDPR policy and processes to ensure client and tenant records are safeguarded? | | | Yes / No |
|  | | | | |
| 6. | **Professional Qualifications** | | | |
|  | Do you/ Does the organisation have the following qualifications? RICS Regulated firm / or equivalent *(Please provide details within your submission)* | | | Yes / No |
|  |  | | |  |

**Quality**

Tenderers are required to answer all method statements below. The responses provided here are required to allow the panel of evaluating officers to make a full assessment of your tender submission.

Bidders are reminded that evaluation of the Quality Section will account for 60% of the total tender score.

Each question is given a relative ‘importance weighting and will be scored by the panel on a scale of 0 (lowest) to 5 (highest) to reflect its significance within the overall evaluation. This weighting is shown alongside each question.

The spaces provided below for responses are not representative of the length and depth of response we require. Whilst brevity is appreciated, please generate as much space as required to answer each question in full, ensuring that any additional pages used are clearly cross-referenced to the specific method statement being addressed.

Please note: The Council welcomes innovation, including the use of new technology in the performance and monitoring of services where this offers opportunities for improved efficiency in management or delivery of the Service and/or where improvements to the environmental sustainability of the process are achieved.

|  |  |
| --- | --- |
| **0** | **Non-compliant response**. No answer or not relevant information. |
| **1** | **Poor response**. Partially compliant but with serious deficiencies. |
| **2** | **Weak response.** Partially compliant but with shortfalls. Not all the requirements would be met. |
| **3** | **Acceptable response**. Compliant and all the basic requirements are met, but not exceeded. |
| **4** | **Good response**. Compliant and the answer/solution offers some limited benefits beyond the stated requirements. |
| **5** | **Excellent Response**. Compliant and shows a comprehensive understanding of the requirement and with significant additional benefits beyond the stated requirement. |

The consultant method statements and responses shall form part of the contract and thus the contractor will be legally obliged to comply with the responses provided within the method statements. Should your organisation be successful and receive a place on the contract, any variations to the method statements must receive prior approval from the Council.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Quality** | **Importance Weighting** | **Score 0-5** | **Maximum Possible Score** |
| 1 | Please provide within your submission evidence of meeting the minimum selection criteria requirements and how you propose to deliver the service contained in this document. | 20 |  | 125 |
|  | Response: |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 2 | Please provide evidence of previous case studies and referees which demonstrate similar work carried out. | 10 |  | 50 |
|  | Response: |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 3 | Please provide details on your timescales, availability, customer service, estimated contract length and anything else you deem appropriate. | 10 |  | 50 |
|  | Response: |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 4 | Please provide a Sample Report. | 10 |  | 50 |
|  | Response: |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 5 | Social Value: Identify Carbon it creates, detail steps taking towards achieving net zero carbon, minimising carbon on this contract  Please detail how your company focus’ on Social Value – Environmental, Social, Economic and Wellbeing | 10 |  | 50 |
|  | Response: |  |  |  |

## **Pricing Schedule** (40%)

|  |  |
| --- | --- |
| **Costs** | |
| Price for | £ |
| Please use the space below for an additional items, options, extended warranties, etc.  Add more lines if needed. | |
|  | £ |
|  | £ |
|  | £ |
|  | £ |
|  | £ |
|  | £ |
|  | £ |
|  | £ |
| TOTAL | £ |

Please detail any other fees

All figures to be exclusive of VAT.

**Quote Certificate - Quote For Estate Agent Marketing Services**

CONTRACT PERIOD: as agreed between the parties hereto

* + - 1. We,

……………………………………………………………………………………….

(carrying on business) as

……………………………………………………………………………………….

(whose registered office is) at

……………………………………………………………………………………….

……………………………………………………………………………………….

hereby offer to provide the Services described in the quote in accordance with the terms of the Quote at the rates which we have indicated in the Proposal constituting this Quote.

* + - 1. We agree that the insertions by us of any conditions qualifying this Quote or any unauthorised alteration to any of the quote documents shall not affect the Agreement and may cause the Quote to be rejected
      2. We agree that this Quote is submitted on the basis that the offer herein contained shall remain in force without variation for a period of three months from receipt of this Quote.
      3. If this Quote is accepted by the Council then we undertake to enter into a formal contract in the form of the Agreement prepared at the Council’s expense for the proper and complete fulfilment of the Services
      4. We understand that the Council is not bound to accept the lowest or any quote they may receive nor to pay any expense incurred by us in connection with the preparation and submission of this Quote
      5. We declare that we are not a party to a cartel involving or including any commercial or other arrangement between individuals and/or corporations which is intended to or organised so as to share or control marketing arrangements or prices
      6. We declare that we have not offered to pay or give or agree to pay any sum of money or valuable consideration directly or indirectly to any person nor entered into any agreement or arrangement with any person that he/she shall refrain from quoting or as to the amount of any quote to be submitted
      7. We declare that there is no conflict of interest in our submitting a quote which includes us or partner or group organisation working with the Council to develop the specification, contract documents or other preparatory work for the competition
      8. We undertake not to disclose the amount of our Quote to any person or body before the date and time for the opening of the quotes except where the disclosure, in confidence, of the approximate amount of the quote is necessary to obtain insurance premium quotations required for the preparation of the quote
      9. We agree that we have satisfied ourselves before submitting this Quote as to the correctness and sufficiency of the rates quoted.
      10. We agree that unless and until a formal contract is prepared and executed, this Quote together with the Council’s written acceptance thereof shall form a binding contract in the terms of the Agreement (as defined in clause 1 of this Quote Certificate).

DATE …………………………………………………………….

COMPANY\* (1) Signature: …………………………………………………………….

Name: …………………………………………………………….

Position in Company: …………………………………………………………….

For and on behalf of: …………………………………………………………….

…………………………………………………………….

…………………………………………………………….

(Print Company's full name and registered number)

NOTE:

* + 1. Where the bidder is a limited company the Quote must be signed on behalf of the company by an authorised officer whose designation must be stated and the address of the registered office of the company must be given.
    2. In the case of a partnership the names of all the partners must be given on a separate sheet and attached to this Quote Certificate and must be signed by one of the partners on behalf of the partnership.
    3. Where the bidder is a private firm the Quote must be signed with the firm's name.