

KARBON DEVELOPMENTS LIMITED

**NORTH HYLTON ROAD, SUNDERLAND
(FORMER COLLEGE SITE)**

TENDER BRIEF

TENDER RETURN DATE: 13 December 2019

CONTENTS

1.0	Introduction
2.0	Company Background
3.0	Tender Information
4.0	Tender and Projects Timescales
5.0	Project Information
6.0	Submission Requirements
7.0	Evaluation Criteria
8.0	Tender Package Information and Consideration

1.0 INTRODUCTION

- 1.1 Karbon Developments Limited (**Karbon**) seek to appoint a Main Contractor (**Contractor**) to undertake the design, erection and completion of 105 dwellings at their site known as North Hylton Road, Sunderland.
- 1.2 Following Expressions of Interest and Sifting Brief procedures completed via the DPP3 Portal, Karbon are satisfied that all qualitative assessments are complete and have therefore elected to undertake a Single Stage Competitive Tender based fully on price.
- 1.3 Following the competition tender returns, the Preferred Contractor will work with the Employer and Employer's Team to establish a specification, methodology, duration and cost associated with the wider site remediation works.
- 1.4 Works carried out under a separate contract and completed prior to the commencement of this contract include:
- The demolition and clearance of all existing buildings (together with all remaining items of fixtures, fittings, furniture, etc) with the exception of the substation and gas kiosk.
 - Site remediation to create a construction platform for the future new build dwelling project.

For pricing purposes, the Contractor is to assume the construction platform will be the existing external levels as identified in the topographical information contained within Appendix 8 of the Employer's Requirements.

The contractor must allow for coordination, supervision and a sign off/validation with the Employer's Engineer and the Enabling works Contractor prior to taking possession of the site (full extent to be agreed with the preferred contractor).

2.0 COMPANY BACKGROUND

- 2.1 Karbon provide homes and services which form the foundations for people and places to fulfil their potential. Karbon believe that having a strong foundation enables people to develop the life they want.
- 2.2 As a Registered Provider, Karbon own or manage over 30,000 properties across the North East of England and Yorkshire and develop more homes every year.
- 2.3 Karbon provide social rented, affordable, specialised, shared ownership and market rented homes and also develop shared ownership and market sale homes to meet their customers' aspirations.
- 2.4 As a profit-for-a-purpose business, Karbon invest any surplus they generate into improving their properties and communities, building new homes and delivering services which provide sustainable outcomes for our customers and communities.
- 2.5 Karbon work hard to balance a strong business head with a strong social heart, to ensure they are a successful, sustainable business and a values-driven organisation.
- 2.6 Karbon seek to provide a great customer experience, which is informed by insight, including engagement with current and future customers.
- 2.7 Over the next five years, Karbon will be investing over £233 million in building new homes. From affordable rented housing, to support for those looking to get on the home ownership ladder. From homes for older people who want to live independently, to Extra Care schemes that can provide round-the-clock support for those who are more vulnerable.
- 2.8 The project at North Hylton is part of Karbon's programme of projects to deliver affordable homes in Sunderland.
- 2.9 Further information is available on Karbon's website www.Karbonhomes.co.uk

3.0 TENDER INFORMATION

- 3.1 This Tender Brief sets out the context of the project, the requirements for the project and the selection process/submission requirements.
- 3.2 Karbon seek to engage a competent Contractor to act as Principal Contractor to complete the Design, Erection and Completion of 105 dwellings together with all associated works, more accurately described in the Employer's Requirements.
- 3.3 The contract will be in the name of Karbon Developments Limited, Number 5 Gosforth Park Avenue, Gosforth Business Park, Newcastle upon Tyne, NE12 8EG.
- 3.4 This document is to be used in support of Karbon's competitive tender to select a Contractor for the project and for no other purpose.
- 3.5 This document is made available in good faith. No warranty is given as to the accuracy or completeness of the information contained therein and any liability or any inaccuracy or incompleteness is, therefore, expressly disclaimed by Karbon and their advisers.
- 3.6 Karbon reserve the right to cancel the selection process at any point.
- 3.7 Neither Karbon nor their advisors are liable for any costs resulting from any cancellation of this selection process nor for any other costs incurred by those expressing interest in, discussing or tendering for this contract opportunity.
- 3.8 Karbon are not bound to accept the lowest or any tender submitted in response to this process.
- 3.9 The tender documents include all documents listed on the contents list.
- 3.10 It is essential that the principles of value for money and accountability are addressed at all times. All competing Contractors will formulate proposals based on the same information.

- 3.11 The Preferred Contractor must work with the Employer and the Employer team throughout the tender and pre contract period to achieve best possible value and manage risk.
- 3.12 The preferred Contractor will be responsible for the completion of the project.
- 3.13 A copy of all project information currently available is included within the Appendices of the Employer's Requirements document.
- 3.14 During the tender process, Contractors must undertake a site visit with their team in order to fully understand the existing buildings and site characteristics. All site visits can be arranged with Claire O'Shea, Senior Development Officer for Karbon (claire.oshea@karbonhomes.co.uk). Please copy John Shearsmith of Elliott Associates into all correspondence (john@ea-epl.com).
- 3.15 Tender Returns must consist of the documentation as detailed within the submission checklist within the Appendices of the Employer's Requirements.
- 3.16 Tenders will be assessed on financial submissions (i.e. the price for the whole of the works). Refer to Section 7.

4.0 TENDER AND PROJECT TIMESCALES

4.1 Karbon is not bound to accept any tender. However, the estimated timetable for reaching a decision on the contract award is given below. Please note this is for information only and may be subject to change.

Stage	Timing
Site visit/open days	Refer to section 3.15
Latest date for enquiries/questions	Five working days prior to submission of competitive tender
Tender returns	12 noon 13 December 2019
Interviews (if required)	w/c 20 January 2020
Confirmation of selected bidder	7 February 2020
Legal Meeting(s)	TBA
Legal agreements completed	28 February 2020

Indicative Delivery Programme

Stage	Timing
Planning application submission	16 August 2019
Resolution to Grant Planning Permission	13 December 2019 (Anticipated)
Completion of S106 Agreement/ Planning Permission	January/February 2020
Site preparation/enabling works	February 2020
Main Contract/Construction start	July/August 2020
Practical completion	TBA

5.0 PROJECT INFORMATION

- 5.1 The project is to deliver 105 homes along with all associated works to create a high quality environment with the vision of enabling a 'Sustainable Community for All Ages', building upon Sunderland College and Sunderland City Council aspirations for the locality, as set out in their Planning and Development Brief.
- 5.2 Primary access to the development is from the existing college access off North Hylton Road, leading to a central landscaped spine running east-west through the development, in turn leading to a series of shared surface streets and courtyards. A secondary access is provided from Redcar Road; however, this access is restricted and does not enable a north-south vehicular link.
- 5.3 The Local Planning and Highways Authority is Sunderland City Council. A planning application has been submitted (ref 19/01427/FUL) and negotiations are on-going in relation to Section 106 contributions.
- 5.4 Delivery of 105 residential units (100% affordable housing: 95 'Rent to Buy' and 10 'Affordable Rent'). Of the 105 dwellings, 30 will be of Light Gauge Steel Construction in accordance with Karbon's Modern Method of Construction/Accelerated Delivery programme. The remaining units will be of traditional construction.
- 5.5 The Contractor is responsible for the delivery of all associated works including highways, drainage, SuDS, new incoming services, hard and soft landscaping, public open space, play area, boundary treatments and the like, wherever possible to be adopted by the Local Authority.
- 5.6 Dwellings are to be constructed to Karbon Homes Ltd Design Brief (General Needs Housing) which includes the Client's preferred specifications and suppliers together with standards of design (Building Regulations, Building Warranty (NHBC/LABC), Secured by Design, Considerate Constructors, storage requirements etc). Refer to the Employer's Requirements documentation for further details.
- 5.7 A Homes England Grant is required and is anticipated to be available but subject to financial constraints and project viability.

- 5.8 When complete, the project must be to the total satisfaction of the Employer.
- 5.9 The specification and extent of works for the project is detailed within the Employer's Requirements and Associated Appendices.
- 5.10 Portland Consulting Engineers Site Constraints Plan indicates known services within and adjacent to the site, including 2nr pylons and overhead power lines (to remain), locations of ground investigation boreholes, trial pits and inspection pits, existing building positions.
- 5.11 The Project Team with whom the preferred Contractor will work is as follows:

Employer	Karbon Developments Limited
Principal Designer	Storm Tempest Limited
Architect	ID Partnership Northern (Novated)
Structural and Civil Engineer	Portland Consulting Engineers (Novated)
Employer's Clerk of Works	Karbon Developments Limited
Employer's Agent and Quantity Surveyor	Elliott Associates

6.0 SUBMISSION REQUIREMENTS

- 6.1 Submissions in response to this Brief are to consist of the documents identified on the Tender Submission Checklist.
- 6.2 Contractors are required to fully complete the Tender Sum Analysis and preliminaries pricing book included in the Appendices of the Employer's Requirements, ensuring all items are included. Tenders that do not comply with this requirement may not be considered. For tender purposes a construction duration must be advised by the Contractor. The duration must be based on calendar weeks.
- 6.3 The requirement for any additional investigations, surveys and reports necessary to complete the project will be the responsibility of the preferred Contractor and the time associated with such work must be included within the returned construction programme. Where any project information has been provided, this is for guidance only and must not be fully relied upon by the Contractor. No claim for inaccuracies or discrepancies in the information provided by the Employer of their Advisors will be accepted.
- 6.4 Submissions should be returned by **12 noon on 13 December 2019** via the DPP3 Portal. Tender submissions received after the stated tender deadline, for whatever reason, may not be considered.
- 6.5 Failure to fully complete the documents, provide all the information required or meet the above requirements may result in the submission not being considered.
- 6.6 Tender submissions are required to be valid for acceptance for a period of 6 months from the closing date for receipt of submissions.
- 6.7 Any tender queries arising from this Tender Brief or in relation to the project shall be directed, via the DPP3 Portal.
- 6.8 Responses to all tender queries will be issued to all tenderers simultaneously. Contractors must pay attention to all tender queries and ensure that their tender return allows for all tender queries as if they had been issued as part of the original tender package.

7.0 EVALUATION CRITERIA

- 7.1 The tender evaluation will be via Financial Assessment:
- 7.1.1 Contractors are required to fully complete the Tender Sum Analysis and Preliminaries Pricing Schedule; a copy of which is included in the appendices.
 - 7.1.2 The Tender Sum Analysis must include all costs required in order to complete the project.
 - 7.1.3 Contractors must allow for all works required (and associated time and costs) to complete the project.
 - 7.1.4 The requirement for any additional investigations, surveys and reports necessary to complete the project will be the responsibility of the preferred Contractor and the time associated with such work must be included within the returned construction programme.
 - 7.1.5 Bids are deemed to be inclusive of all Contractor's costs including overheads and profit and are exclusive of VAT.
 - 7.1.6 Tenders that do not comply with these requirements may not be considered.
- 7.2 Please ensure all documentation to be returned is signed and dated by an authorised person of suitable seniority within the company.
- 7.3 The tender must be completed with careful reference to the contents of this Tender Brief, including the Specification and Contract Conditions. Failure to complete the tender in full or to provide any documentation requested may result in your tender being rejected.
- 7.4 Tenders made must be in accordance with all the contract documentation and no changes should be made to tender documents or Contract Conditions. Similarly, tenders must not be accompanied by statements making the tender qualified in any way.
- 7.5 Contractors must also note that tenders are being sought on the basis of the Contract Conditions included in this Invitation to Tender. The Employer will not consider a tender which does not comply with its requirements by, for example, being made on the basis of the tenderers' own 'standard conditions'.
- 7.6 The Employer may require a clarification interview from one or more Contractors.
- 7.7 Tendering procedure: In accordance with the tender documents.

- 7.8 Arithmetical errors: Any obvious errors in pricing or errors in arithmetic that are discovered in the priced document(s) before acceptance of this offer, shall be dealt with in accordance with the Alternative 2 procedures as described in JCT Tendering Practice Note (2017).

8.0 TENDER PACKAGE INFORMATION AND CONSIDERATION

8.1 A copy of the tender package information can be accessed via the DPP3 E-Tendering Portal.

8.2 The tender package includes the following information:

TENDER BRIEF

EMPLOYER'S REQUIREMENTS DOCUMENT:

SECTION 1 GENERAL CONDITIONS AND PRELIMINARIES

SECTION 2 KARBON HOMES DESIGN BRIEF/SPECIFICATION

APPENDICES:

APPENDIX 1	TENDER SUBMISSION CHECKLIST
APPENDIX 2	FORM OF TENDER
APPENDIX 3	NON-COLLUSION AND BONA FIDE TENDER FORM
APPENDIX 4	TENDER SUM ANALYSIS AND PRELIMINARIES PRICING SCHEDULE
APPENDIX 5	ARCHITECTURAL PACKAGE
APPENDIX 6	CIVIL AND STUCTURAL ENGINEER'S PACKAGE
APPENDIX 7	SITE CONSTRAINTS PLAN
APPENDIX 8	TOPOGRAPHICAL SURVEYS
APPENDIX 9	EXISTING BUILDINGS PLAN
APPENDIX 10	UTILITY SEARCHES, SITE SCANS
APPENDIX 11	PHASE 1 DESKTOP, PHASE 2 GI AND SITE APPRAISAL AND REMEDIATION STRATEGY
APPENDIX 12	FLOOD RISK ASSESSMENT
APPENDIX 13	PRE-CONSTUCTION INFORMATION PACK
APPENDIX 14	LANDSCAPE PROPOSALS
APPENDIX 15	ARBORICULTURAL IMPACT ASSESSMENT
APPENDIX 16	ECOLOGICAL APPRAISAL
APPENDIX 17	HABITAT REGULATIONS ASSESSMENT
APPENDIX 18	AIR QUALITY ASSESSMENT
APPENDIX 19	NOISE IMPACT ASSESSMENT
APPENDIX 20	TRANSPORT ASSESSMENT AND FTP

APPENDICES (Continued):

APPENDIX 21	ARCHAEOLOGY
APPENDIX 22	DESIGN AND ACCESS STATEMENT
APPENDIX 23	KEY PERFORMANCE INDICATORS
APPENDIX 24	HANDOVER PRO-FORMAS AND METER READING SCHEDULES
APPENDIX 25	COMPONENT SCHEDULE AND COMPONENT ACCOUNTING
APPENDIX 26	TENDER QUERY FORM
APPENDIX 27	TEMPLATE PCG
APPENDIX 28	TEMPLATE PERFORMANCE BOND
APPENDIX 29	TEMPLATE COLLATERAL WARRANTIES
APPENDIX 30	APPOINTMENTS AND NOVATION AGREEMENTS
APPENDIX 31	SCHEDULE OF AMENDMENTS TO JCT DB16