

# PROJECT AND STRATEGY MANAGER TENDER

14 HYBRID OFFICE/INDUSTRIAL  
UNITS

At

Plots 11 & 12, Cornwall Business  
Park (West)

For

JAD Developments (Redruth) Ltd

February 2017

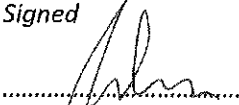
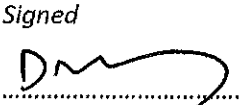


**European Union**

European Regional  
Development Fund

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|                 |                                    |                                                                                                      |                  |            |
|-----------------|------------------------------------|------------------------------------------------------------------------------------------------------|------------------|------------|
| <b>Author</b>   | Richard Salmon<br>Senior Surveyor  | <b>Signed</b><br> | <b>Job No.</b>   | 16-4162QS  |
| <b>Approved</b> | Darren Willcocks MRICS<br>Director | <b>Signed</b><br> | <b>Date</b>      | 08/02/2017 |
|                 |                                    |                                                                                                      | <b>Issue No.</b> | 1          |
|                 |                                    |                                                                                                      | <b>Revision</b>  | -          |

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## **1 Introduction**

### **1.1 Project Information**

#### **Project Title:**

Proposed Erection of 14 hybrid office/industrial units (B1 Use Class) together with car parking and landscaping.

#### **Description of the works:**

Providing recommendations on business plan, delivery structure, planning, economic impact, property valuation, funding and project management.

#### **Location of the works:**

Plots 11 & 12, Cornwall Business Park (West), Scorrier, Cornwall

#### **Tender period:**

2.5 weeks

#### **Name and Address of:**

Employer: JAD Developments (Redruth) Ltd.  
Chappell House  
The Green  
Datchet  
Slough  
PSL3 9EH

Employers

Consultant: Ward Williams Associates  
Compass House  
Truro Business Park  
Threemilestone  
Cornwall  
TR4 9LD

#### **Form of Contract:**

RICS Standard Form of Consultants Appointment 2011

### **1.2 Project outline**

JAD Developments (Redruth) Ltd. are proposing to carry out an industrial development at Cornwall Business Park (West), Scorrier and require the services of a Practice to assist with the scheme. The proposals for the site are for it to be developed to include warehouse/factory and office Employment Space. The project aims to be part funded by ERDF and targets to create work-space to provide employment in the area.

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The Planning Application for the scheme has been approved and can be viewed online on the Cornwall Council Planning website under the application reference PA16/09294.

The client wishes to appoint a practice to provide advice on the business plan and delivery structure required to ensure the project successfully meets their aims. They also require advice regarding the planning and economic impacts of the development to maximise the project's success. A key aspect of the advice is regarding the ERDF funding which is key to development to taking place.

This document is a combined Pre-Qualification Questionnaire (PQQ) and Invitation to Tender (ITT) to establish the ability of the tendering practices to carry out work of this type and assess their proposals for completing the work required under this tender. The assessment of the submissions will be carried out on a price and quality basis. Within each section of this tender is given the weighting that it forms within the scoring of the combined PQQ and ITT. A summary of the weighting is as follows;

|             |           |
|-------------|-----------|
| PQQ         | pass/fail |
| ITT quality | 70%       |
| ITT price   | 30%       |

The client reserves the right to postpone the intended closing date for bids and to accept any tender or no tender at all.

It will be a condition of the invitation to tender that the tenderer should not at any time prior to notification of the award of the contract disclose to or otherwise discuss with any other tenderer or any other third party its actual or intended tender price or any approximation of that price. Your indication that you wish to submit a tender will be taken as acceptance of that condition.

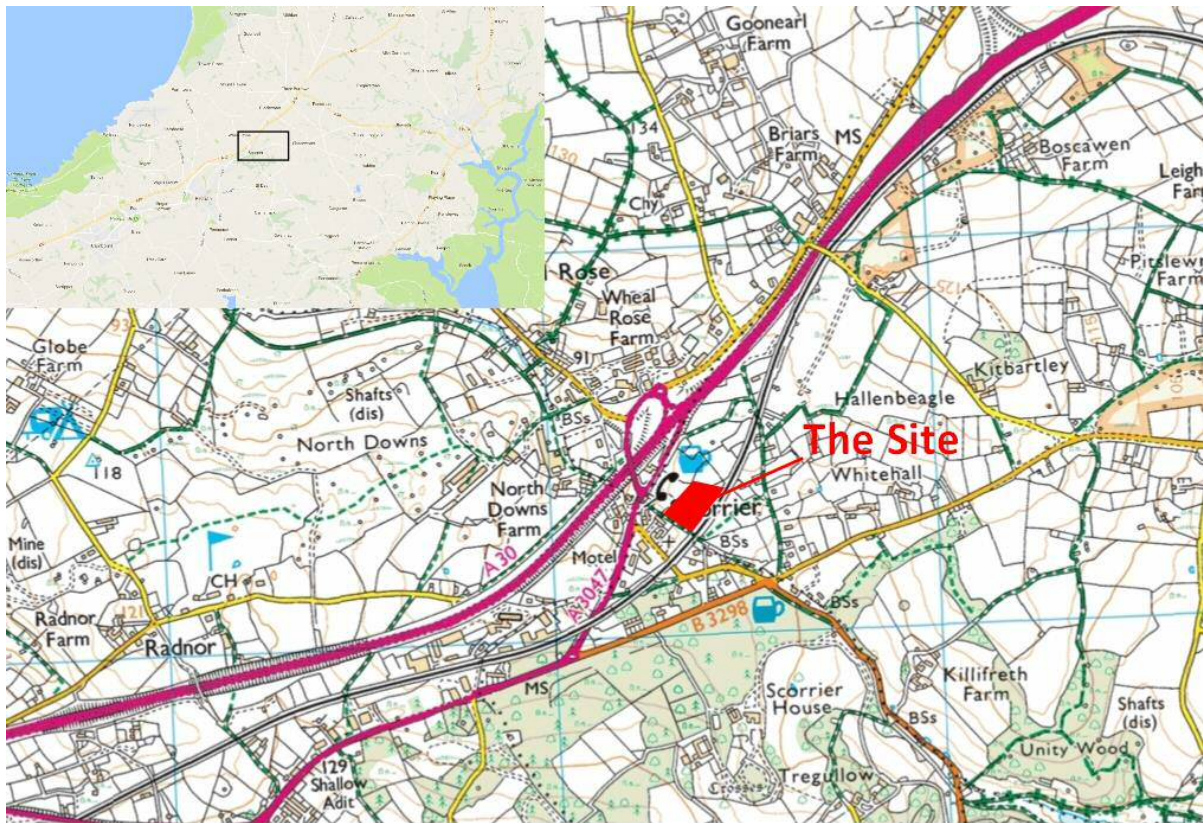
The client offers no guarantee that the lowest or any tender will be recommended for acceptance or accepted.

The client will not be responsible for any cost incurred in the preparation of any tender. Any acceptance of the tender will be subject to the execution of the formal appointment document and to the receipt of any approval necessary for the work.

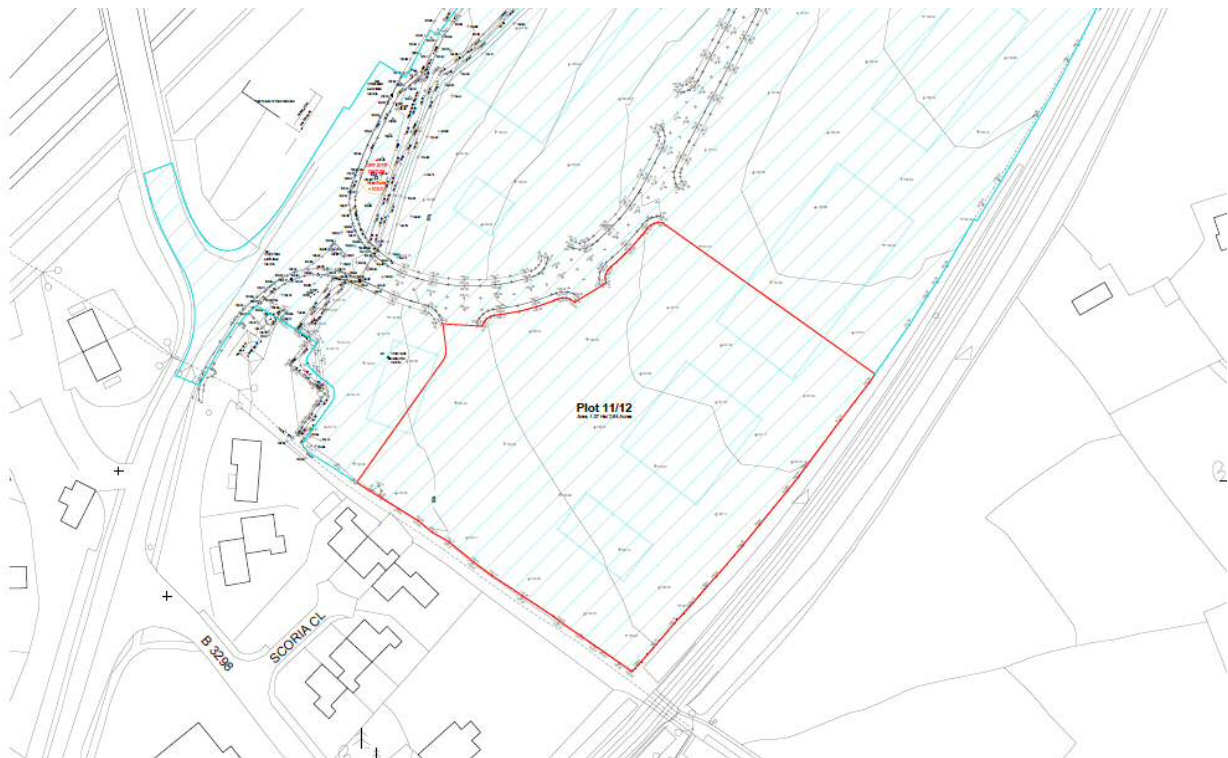
**All tenderers are to complete sections 3, 4 and 5 and return their submission by 3:00pm on Friday 24<sup>th</sup> February 2017 to:**

**Richard Salmon  
Ward Williams Associates  
Compass House  
Truro Business Park  
Threemilestone  
Cornwall, TR4 9LD**

**By submitting a tender, the tenderer agrees that the offer shall remain open for consideration for 6 weeks from the date set for the receipt of tender.**



(fig. 1: site location)



(fig 2: the site)

### 1.3 Scope of works

The Outcome of the tender will be to appoint a company to act as Strategy and Project Manager for the scheme. The outcome of the appointment will be to provide recommendations for the economic, planning and funding aspects of the development. The aim is for the project to be partially ERDF funded and the professional documents and reports will be required to fulfil the standard ERDF funding requirements, fulfil ERDF levels of information and provide the depth of information to satisfy all ERDF Audit requirements and the consultant will not act to jeopardise this funding by breaching any of the funding conditions.

The deliverables are:

1. Provide advice on company and project delivery structure,
2. Liaison with accountants and solicitors,
3. Provide Town Planning advice,
4. Provide planning policy and economic development policy advice,
5. Provide economic impact assessment advice,
6. Provide property valuation advice in respect of existing and completed development values,
7. Provide advice in respect of project funding and funding arrangements,
8. Preparation of project business plan and development cash flow forecasts,
9. Provide comprehensive financial monitoring throughout the development phase of the project, including funding drawdown and audit arrangements,
10. Provide a project management role through to the final completion of the project,
11. Provide a lead role in the overall coordination and implementation of the project.

### 1.4 Anticipated programme

|                                   |                      |
|-----------------------------------|----------------------|
| Combined PQQ/ITT issued:          | 8 February 2017      |
| Combined PQQ/ITT returned:        | 24 February 2017     |
| Combined PQQ/ITT assessment:      | 3 March 2017         |
| Appointment of chosen tenderer:   | 8 March 2017         |
| Issue construction tender:        | 12 April 2017        |
| Construction tender submission:   | 3 May 2017           |
| Appointment of chosen contractor: | 10 May 2017          |
| Start construction on site:       | June 2017            |
| Completion of construction:       | May 2018 (estimated) |

### 1.5 Submissions

Tenderers will be required to submit the following information as part of the tender:

- A) Completed Pre-Qualification Questionnaire
- B) Completed Invitation to Tender quality assessment
- C) Completed Invitation to Tender price assessment

The above information will be used to evaluate the submission from which the winning tender will be selected.

## 1.6 Tender Evaluation Criteria

As stated in the instructions to tenderers (item 2) the overall price quality split will be: Pre-Qualification Questionnaire (pass/fail), Invitation to Tender Quality (70%) and Invitation to Tender Price (30%).

### **The Pre-Qualification Questionnaire (PQQ) and Invitation to Tender (ITT) Quality element evaluation criteria and associated weighting**

It is intended that contractors will be expected to provide the PQQ and ITT qualitative assessment information relating to each question within their returned bid documentation.

#### **PQQ Evaluation**

Each PQQ question will be assessed against the pass/fail criteria. If the criteria are met the ITT quality and price submission will be assessed. If the criteria are not met the submission has failed the requirements and the ITT quality and price submission will not be assessed.

#### **ITT Quality Evaluation and scoring**

Table 1 (Evaluation Scoring Criteria) sets out the guidance and scores that can be awarded to each quality criterion being assessed. Each ITT quality question must be assessed and scored against the Evaluation Scoring Criteria in Table 1. This will then need to be divided by 5 to obtain the actual score. Scores will be awarded by multiplying the weighting of the chosen criterion by the desired score. The calculation appears as follows:

Agreed Score for selected Criterion multiplied by weighting for chosen criterion.

#### **PQQ and ITT Quality Evaluation and scoring example**

For example, this tender will be assessed on a 10% PQQ, 60% ITT quality and 30% ITT price ratio with three PQQ and two quality assessment criteria:

##### PQQ Element

- Each PQQ and quality assessment questions weighting is indicated against each question
- The Employer assessed the first PQQ question and scored it as a pass
- The Employer assessed the second PQQ question and scored it as a pass
- **Therefore, the PQQ has achieved a pass**

##### ITT Quality Element

- The Employer assessed the first PQQ question and scored it 3
- The Employer multiplies 10% by 3 and then divides the answer by 5
- The resulting calculation gives a quality score against question three of 6.0%
- The Employer assessed the second quality question and scored it 4
- The Employer multiplies 60% by 4 and then divides the answer by 5
- The resulting calculation gives a quality score against question one of 48%
- **Therefore, the total weighted ITT Quality score is 54% (out of a possible 70%)**

### ITT Price Scoring

The total price ratio is 30%.

The price score is calculated as follows:

$$\left[ \frac{\text{Lowest Price}}{\text{Tenderers Price}} \right] \times \text{Weighting}$$

For example, if the lowest tender price is £50,000 and Tenderer 1's price is £67,300 their total weighed ITT Price score would be:

$$\left[ \frac{\text{£50,000.00}}{\text{£67,300.00}} \right] \times 30\% = 22.3\%$$

### Total Scores

The preferred Tenderer will be that which achieves the highest overall PQQ, ITT quality and ITT price combined score. In the example given that will be as follows:

| Scores                          | Tenderer 1   |
|---------------------------------|--------------|
| PQQ Scores                      | pass         |
| ITT Quality Scores (out of 70%) | 54.0%        |
| ITT Price Scores (out of 30%)   | 22.3%        |
| <b>Total (out of 100%)</b>      | <b>76.3%</b> |

The tenderer with the highest score from the 100% available will be the preferred tender.



### **Evaluation Scoring Criteria**

| Score | Guideline for assessors                                                                                                                                                                                                                         |
|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0     | Completely fails to meet required standard or does not provide a proposal.                                                                                                                                                                      |
| 1     | Response significantly fails to meet the standards required, contains significant shortcomings or is inconsistent with other proposals.                                                                                                         |
| 2     | Response falls short of achieving expected standard in a number of identifiable respects.                                                                                                                                                       |
| 3     | Response meets the required standard in most material respects, but is lacking or inconsistent in others. The assessment indicates the tenderer has demonstrated, with some reservations, their ability to provide the services being assessed. |
| 4     | Response meets the required standard in all material respects and the assessment indicates the tenderer has demonstrated their ability to provide the services being assessed.                                                                  |
| 5     | Response meets the required standard in all material respects and in exceeding some or all of the major requirements represents an exceptional demonstration by the tenderer of their ability to provide the services being assessed.           |

*(Table 1)*

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## 2.0 Conditions of Appointment

### RICS Standard Form of Consultants Appointment 2011

The Client: JAD Developments (Redruth) Ltd.

Company Registration Number 10353062  
Chappell House  
The Green  
Datchet  
Slough  
SL3 9EH

The Consultants TBC

#### Schedule 1

Services Other: as listed in Section 1.3 of the Project and Strategy Manager Tender Document

#### Schedule 2

Part A – Fee Hourly rates as described in Section 5 of the Project and Strategy Manager Tender Document

Part B – Fee Instalments Fees are to be paid on a monthly basis

Part C - Reimbursable Expenses Part C applies

Part D – Rates for Additional Services To be completed in accordance with the rates given in the tender submission

#### Schedule 3

Client's Brief As set out in the Project and Strategy Manager Tender Document  
The appointment is to be executed as a deed

#### Appendix

##### Definitions

The Adjudicator President or Vice President of the RICS

The Professional Team Architect: TBA  
Civil and Structural Engineer: TBA

The Project: Proposed Erection of 14 hybrid office/industrial units (B1 Use Class) together with car parking and landscaping

The Site: Plots 11 & 12  
Cornwall Business Park (West)  
Scorrier  
Cornwall

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|                                                                                                         |                                                                                                                                                                           |
|---------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                         | TR16 5BN                                                                                                                                                                  |
| The Discipline of the Consultant                                                                        | Project and Strategy Manager                                                                                                                                              |
| Lead Consultant                                                                                         | The Consultant is the Lead Consultant                                                                                                                                     |
| CDM Regulations                                                                                         | The Consultant is not a “designer” for the purposes of the Regulations                                                                                                    |
| Design Responsibility                                                                                   | The Consultant is not responsible for the design of the Project<br>The Consultant is not responsible for specifying and/or approving materials                            |
| Prohibited Materials                                                                                    | Clause 4.5 is not applicable                                                                                                                                              |
| Maximum Aggregate Liability                                                                             | The maximum aggregate liability of the Consultant is limited to the amount of the Consultant’s professional indemnity insurance specified in Clause 12.1 of this Appendix |
| Net Contribution                                                                                        | Clause 5.2 is applicable                                                                                                                                                  |
| The persons referred to                                                                                 | The Building Contractor, any sub-contractors and the other members of the Professional Team                                                                               |
| 6.1 Collateral Warranties or Third Party Rights                                                         | The Consultant is not required to provide Collateral Warranties or to confer Third Party Rights                                                                           |
| Persons to whom Collateral Warranties are to be provided or in whom Third Party Rights are to be vested | None                                                                                                                                                                      |
| Consultant’s Personnel                                                                                  | As listed in the tender submission for Section 4.2 of the Project and Strategy Manager Tender                                                                             |
| The person referred to in Clause 8.6                                                                    | None                                                                                                                                                                      |
| Reimbursement of Disbursements and Expenses                                                             | The Client reimburses disbursements and expenses in accordance with Part C of Schedule 2                                                                                  |
| Payment dates and Withholdings                                                                          | The final date for payment is 28 days after the due date in accordance with Clause 9.6                                                                                    |
| The amount(s) referred to in Clause 11.1(b)                                                             | Nil                                                                                                                                                                       |
| Professional Indemnity Insurance                                                                        | One Million Pounds for each claim or series of claims arising out of any circumstance/in the aggregate                                                                    |

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|                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Save for the following risks        | None                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Waiver of rights                    | The Consultant does not waive its rights under Chapter IV of the Copyright, Design and Patents Act 1988                                                                                                                                                                                                                                                                                                                                                                                                      |
| Assignment                          | The benefit of this Appointment may be assigned without the consent of the Consultant by the Client by way of an absolute legal assignment to another person (A1) acquiring the Client's interest or the Client Group Company's interest in the Project and by A1, by way of an absolute legal assignment, to another person (A2) acquiring A1's interest in the Project. No further or other assignment of this Appointment is permitted and, in particular, A2 is not entitled to assign this Appointment. |
| Termination following Suspension    | Period of suspension is 6 months                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Nominating body for Adjudicator     | President or Vice-President of the Royal Institution of Chartered Surveyors                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Arbitration or litigation           | Arbitration is the method of dispute resolution                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Nominating body for Arbitrator      | President or Vice-President of the Royal Institution of Chartered Surveyors                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Addresses of Consultant and Client  | Consultant: The address set out at the head of this Appointment<br>Client: The address set out at the head of this Appointment                                                                                                                                                                                                                                                                                                                                                                               |
| Non-postal methods of giving notice | None                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

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**3.0 Pre-Qualification Questionnaire**

**3.1** The Pre-Qualification Questionnaire is assessed on a pass/fail basis.

**3.2 Pre-Qualification Questionnaire**

In respect of the Project identified in this document, please indicate the following:

1. A copy of the company's insurances: Professional Indemnity insurance to a minimum level of £1 Million (weighting 0% - pass or fail).
  
  
  
  
  
  
  
  
  
  
2. A copy of the Company's Health and Safety Policy (weighting 0% - pass or fail).

A fail on either question 1 or 2 above will result in the tenderer not passing the requirements for the PQQ and therefore the tender will be excluded from the bid.

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#### **4.0 Invitation to Tender Quality Assessment**

4.1 The Invitation to Tender Quality Assessment will form 70% of the overall tender evaluation. This section will be marked in accordance with the criteria set out in Section 1.6.

#### **4.2 ITT Quality Assessment Questions**

1. Provide details of how the abilities and lessons learnt on previous similar projects will benefit the delivery of this project.

Submission to consist of a maximum of 1 side of A4 with reference to a minimum of 3 previous similar projects.

Higher marks will be awarded to companies who best demonstrate how the methods, knowledge and resources used successfully on similar previous projects can benefit this project. (Weighting – 10%).

2. Provide CVs of the proposed staff to resource this project demonstrating their experience, ability and suitability to deliver services for this project.

Submission to consist of a minimum of 2 CVs.

Higher marks will be awarded for CVs which demonstrate the proposed staff will be capable of providing a high quality of service based on experience, ability and suitability. (Weighting – 60%).

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**5.0 Invitation to Tender Price Assessment**

- 5.1 The Invitation to Tender Price Assessment will form 30% of the overall tender evaluation. It is not currently possible to fully define the scope of the works due to the extent of liaison with various parties and assisting the client with their company structure and funding. Therefore, the tenderers are asked to provide hourly rates which will be applied to the estimated numbers of hours. The resulting total will be used for assessment purposes and for comparison between the submitted tenders.
- 5.2 Upon appointment, the hourly rates given will be used to agree the amount to be paid for delivering the services required under this tender. Fees, disbursements and expenses will be paid on provision of appropriate evidence and, if appropriate, the % charge for handling added as stated in the tender submission.

### 5.3 ITT Price Assessment Schedule of Rates

The tenderer is to complete the table below filling in all items and complete the calculation to provide a total cost based on the quantities given. This total will be used to compare the tenders.

|                                                                                  | Quantity | Unit | Rate | Total     |
|----------------------------------------------------------------------------------|----------|------|------|-----------|
| <b>Time Charges</b>                                                              |          |      |      |           |
| Partner/Director                                                                 | 300      | Hr   |      |           |
| Senior Associate/Associate                                                       | 650      | Hr   |      |           |
| Intermediate                                                                     | 250      | Hr   |      |           |
| Assistant                                                                        | 100      | Hr   |      |           |
|                                                                                  |          |      |      |           |
| <b>Expenses and Disbursements:</b>                                               |          |      |      |           |
| Allow and Provisional Sum for Expenses and Disbursements of Five Thousand Pounds |          |      |      | £5,000.00 |
| Percentage addition for handling charge on Expenses and Disbursements            |          | %    |      |           |
|                                                                                  |          |      |      |           |
|                                                                                  |          |      |      |           |
| <b>Total to be assessed</b>                                                      |          |      |      |           |