



PART A PROJECT BRIEF AND SPECIFICATION

Issue Date: **March 2017**
Department: **Commercial Services**

Message for Staff only (bidders please ignore).

Please provide, delete as appropriate or complete all information below as marked in red, change to black and then delete all blue instructions. Should you need to provide any other information not covered by the headings below – please insert extra rows where most appropriate? Where information is not relevant – state N/A rather than delete the heading. Reformat once complete.

1	PROJECT DETAILS	
	Name of Council Procuring this Contract	
	???	
	Project Name	
	???	
	Project Address	
	???	
	Where the services are to be provided or delivered?	
	Project Manager Name	
	???	
	Project Description/ Scope of works	
	???	
	Contract type	Works, Services, Goods, Goods & Services Concession
	Estimated contract value	Please provide the annual value for a cyclical contract or the project value for a single requirement. Ideally – list this as a range which is +/- 20% of where you hope the costs to be.
	Turn over requirement	Please provide a value – this needs to be 2x highest value listed in item 6 above

2	INSURANCE REQUIREMENTS	
	Public Liability Requirements	£5million
	Employer liability Requirements	£5million
	Professional Indemnity Requirements	£2million
	Product Liability Level	£1million
3	PROCUREMENT ROUTE	
	<p>Simple Tender - UK Contracts Finder (over £25,000) EU tender – OPEN TENDER process – OJEU Notice and Contracts Finder</p> <p>OJEU Notice (over £164,176 for services and supplies and £4,104,394 for works across the whole period of the contract).</p>	
4	PROCUREMENT TIMETABLE	
	Tender issued	Date
	Deadline for Questions	One week before submission deadline
	Tender return Date	Min 3 weeks below OJEU Min 5 weeks OJEU process
	Anticipate award date	
	Any other critical dates	Please list and re-sequence with the above into a chronological sequence
5	CONTRACT INFORMATION	
	Form of Contract	<p><i>(delete as appropriate)</i></p> <ul style="list-style-type: none"> • New Framework Agreement <i>and/ or</i> • Council Standard Conditions for Goods • Council Standard Conditions for Services • JCT Minor Works 2016 • JCT Intermediate Contract 2016 • NEC Option A • NEC Short Form • Existing Framework/ mini competition • Other

	Design Requirement <i>(product design, construction drawings, layouts or floor plans, specifications by a specialist company)</i>	Yes/ No
	Collaborative Procurement <i>(Contact includes other Public Sector Bodies)</i>	Applies/ does not apply
	Cost Saving & Improvement options <i>(The Council are seeking innovation and alternative price options – in addition to a compliant price against the specification provided.)</i>	Applies/ does not apply
	Sustainable development & environmental considerations <i>(The Contract requires specific Consideration regarding impacts on the environmental, whole life costing and end of life disposal, etc.)</i>	Applies/ does not apply
	Price Fluctuations/ annual increases <i>(this contract allows for an annual increase as detail here, starting from the following April, after an initial 12-month period as passed)</i>	<i>(delete as appropriate)</i> <ul style="list-style-type: none"> • Fixed price for the whole duration of the contract • RPI • Other
	Bond Required – 10% of annual/ total Contract Value <i>(please contact procurement/ legal for guidance)</i>	Required/ not required Value required
	Parent Company Guarantee	Required/ not required
	Proposed Contract Start/ Base Date <i>(plus possession of site if applicable)</i>	Please list the proposed date (it is an estimate and can be amended) ???
	Contract End Date	Please list the proposed date (it is an estimate and can be amended)
	Initial Contract Duration	Up to a maximum of 5 years for the initial award
	Option to Extend – Durations	YES/ NO

	Details	<ul style="list-style-type: none"> • Please state the maximum extension available (up to 5 years) • e.g. for three years, state - Plus 1, plus 1, plus 1 • Notified 3 months before the contract end date.
	Option to Extend – maximum total contract value	<p>Please state the TOTAL Additional Value for the maximum extension period</p> <p>(Please ensure you factor in any expected increases & decreases +15% margin)</p>
	Execution Method	<ul style="list-style-type: none"> • Under Hand (<i>signed by a Director if under £300k</i>) • As a Deed (<i>by Legal - for ALL Construction Contracts and where the goods and services contracts are over £300k</i>)
	Variations	<p>Please detail how variations will be managed e.g.</p> <ul style="list-style-type: none"> • Additional purchase order • Amendment to existing order • Managed by the Contract administrator in accordance with industry contract • Other (please attach in the appendices section)
	Other information regarding contractual requirements e.g. lead times, min/ max delivery quantities and periods, delivery costs	???
6	OTHER INFORMATION	
	Price to be held open for	120 days
	Price: Quality evaluation split	60:40
	Living wage Applies	YES
	Payment Terms	30 days
	Product Warranty	No of years required
	Collateral Warranty <i>from a subcontractor for any product or system design.</i>	Required/ not applicable
	Service/ maintenance provision	Please detail?

	Construction – latent defects	12 years
	Liquidated & Ascertain Damages (or equivalent)	<i>Please note this is NOT a penalty provision, but rather a calculation of costs incurred or loss of income due, to performance failure.</i> If required, please provide details of the weekly charge and provide details of how calculated to demonstrate suitability.
	Subcontracting	<i>(delete as appropriate)</i> <ul style="list-style-type: none"> • This Contract does/ does not allow for subcontracting. • Subcontracting cannot cover the key elements of this contract • Subcontracting cannot exceed 25% of the Contract Value.
7	HEALTH & SAFETY	
	CHAS (<i>construction Contracts Only</i>)	Is the Construction Health & Safety Accreditation required?
	CIS (<i>construction Contracts Only</i>)	Is the employer a Contractor for the CIS
	CDM applies (<i>construction Contracts Only</i>)	Is the Project notifiable (<i>more than 30 days, more than 20 workers simultaneously, exceeds 500 person days</i>)
	CDM Coordinator (<i>construction Contracts Only</i>)	Name of Principle Contractor/ Contract administrator if applies
	H&S requirements	
8	LEGAL DISPUTES	
	The Council applies the principles of In a dispute	Arbitration/ Mediation/Escalation
	The Council will use..... In a dispute	<i>(delete as appropriate)</i> <ul style="list-style-type: none"> • CEDAR (Centre for Effective Dispute Resolution) • Royal Institute of Chartered Surveyors • other

Note to Staff:

Please Note – this section is a Guide- Please provide all of the following information (where relevant) but it does not need to be in this format or sequence should you have a previous specification/ requirement document that you wish to re-use.

PROJECT SPECIFIC INFORMATION

1. Project Brief

Please provide a detailed explanation against the following headings

- Background to Project
- Description of requirements
- Estimated Value

Please include any other information that may make this project complicated or technically specific to assist tenderers with understanding our requirements and not wasting time on a contract for which they may not be suited

2. Specification, Materials & Workmanship

Please provide the following information as applicable to your tender. If Product sheets or industry templates are being used, please detail that here and list/ attach as appendices

- Industry Standard Specification
- Product Sheets
- Bespoke requirements
- Output spec/ performance requirements
- Durability/ usability/ Warranty
- Environmental considerations
- Aesthetic requirements

3. Design Requirements

Please advise if there are any design requirements, what they are, how they need to be met, and specific insurances, liabilities or collateral warranties that may be needed and how this will be monitored and performance checked.

- Please provide a project/ service specification

4. Qualifications & Accreditations

The Council places significant consideration in quality of services provided and as such it is ensure that tenderers understand our requirements and have the capability and experience of delivering a contract to those standards and in a specific manner

- ISO reference or equivalent
- Technical/ trade Memberships where essential
- Accreditations
- Other

Please note – we cannot insist upon or disqualify tenderers on not having ‘nice to haves’ memberships, but where the industry requires specific accreditations, e.g. financial services; we can require that accreditation as a minimum

5. Key Performance Indicators and methods of Measurement

The Council is seeking to improve Contract performance and outcomes and to do this, we need to define a list of essential performance measurements that will assist us in ensuring that the contract will deliver what and how we want the provision to provide. Some suggestion being

- Deadlines/ Timescales/ lead-times
- Budget
- Performance/ output levels
- Satisfaction levels

6. Quality Evaluation Criteria

The Council needs to define EXACTLY how the tender will be evaluated and the Tenderer’s responses to the questions asked will also become part of the Performance measurement mechanism. As such, each question needs to

7. be OPEN (not able to be answered by YES/NO)
8. relate to the contract requirements and various constraints
9. enable a performance measure to be created
10. have a clear percentage of the total score attributed
11. be extensive enough that the response can be scored out of ten for meeting our requirements

Some suggested headings being

- Resources
- Programme
- Documentation
- Quality Control

- Supply Chain
- Community Benefits

12. Quality Control Processes

Please detail who and how the project/ contract will be managed; this could be meetings, inspections, surveys, reports etc.

- Contract Manager Name
- Review Period/ meeting requirements
- Report Requirements/ formats

This information needs to be detailed and precise so as to ensure expectations and contractual monitoring requirements are very clear

13. Pricing Information

Please provide a pricing document, this can be

- Lump sum
- Stages/ tasks
- Schedule of rates (shopping list of requirements; including optional or infrequent needs)

Please detail how the pricing will be applied and how the information will be evaluated

- Actual value for the whole requirement of various tasks – lowest scoring full marks and the rest pro-rata
- Basket of rates – construction contract
- Pricing model – arbitrary quantities provided from which a single figure can be calculated

Please include a worked example or written explanation that makes the evaluation clear to all tenderers.

14. Programme & Sequencing

Please explain the overall time scale for the project; please provide as much information as available to ensure our requirements are understood and can be met.

- Timescales,
- Key Dates
- Stages
- Partial Completion, Staged Payments
- Gantt chart/ Critical Path events where known/ available

15. Communication & Documentation

Please detail any formal requirements regarding communication and audit trails

16. Contract Use/ award/ Call-off arrangements

Please detail who can use this contract and how the contract is to be administered, e.g.

- Construction Contract could be a single order or several small orders for individual requirements (MTC or Term Contract)
- It could be a framework with mini competitions each time a requirement arises
- It could be a call off contracts such as for stationery

Where an extension option is included, please detail when and how these might be applied as this can impact pricing considerations by the tenderer. If nothing is detailed here, it is assumed that any extension will be in yearly increments, notified 3 months before the contract ends.

17. Additional Information

18. Appendices

- a. Drawings & Drawing Register
- b. Pricing Document
- c. List of Project Consultants
- d. Product sheets/ industry spec

19. List of Contract Documents

- a. Contract Document
- b. Specification/ Employers Requirements/ Specialist Reports
- c. Signed Form of Tender
- d. Completed Pricing Document
- e. Method Statements/ Contractor Proposals