

Tender for building and facilities management services

The Mead Educational Trust

Date of issue: 01st October 2024

TENDER RETURN TIME & DATE:

12:00 noon, 11th October 2024

1. Background

The Mead Educational Trust (TMET), a multi-academy trust, currently consists of 8 primary schools and 5 secondary schools (2 of which are free schools). 12 of the schools are located within Leicester City, and 1 in Leicestershire.

TMET has been in receipt of School Condition Allocation (SCA) funding since April 2019. The 2024/25 allocation is £1,405,388. Expenditure in any one year may exceed the allocated amount due to funds being carried forward.

Some TMET Schools require significant amounts to be spent in order to ensure that they remain safe and compliant. Detailed building condition surveys were carried out on all schools in April 2024, and these include a list of remedial works categorised by condition rating and priority assessment on a year by year basis as follows:

Key:

Condition Rating	Description
Good	Performing as intended and operating efficiently
Satisfactory	Performing as intended but exhibiting minor deterioration
Fair	Exhibiting major defects and/or not operating as intended
Poor	Life expired and/or serious risk of imminent failure

2. Key contact and contract administration information

The Deputy Chief Operating Officer (DCOO) under the direction of the Chief Financial & Operating Officer (CFOO) is responsible for managing the School Condition Allocation funding scheme, with support from the Head of Estates, and will be the main point of contact. The Executive Teams will input into the process for project allocation, but the CFOO, via delegated responsibility from the Board of Trustees, retains overall authority for any decisions required. The Board of Trustees will be responsible for approving the proposed schemes, according to the recommendations made by the successfully appointed company.

The DCOO and Head of Estates will be involved in all initial discussions and site visits relating to a scheme's specification, liaison with school personnel regarding the final specification, agreement of the final specification with the successful tenderer, attendance at pre-start on site meetings, attendance at some (but not all) site progress meetings and snagging meetings.

The Principal, Academy Manager and premises contact at each school will attend all meetings held on site. Any contract variations must be agreed with the DCOO. Scheme contracts will be checked by the CFOO before being signed by the TMET Chair of Trustees. All payment certificates and associated invoices will be passed for payment by the DCOO and approved in line with the Trust's Finance Policy. All scheme documentation (final specification, tender report, risk assessments and method statements, final contract and any contract variations, payment certificates and invoices, snagging list, practical completion certificate, warranties, operations and maintenance files, and the health and safety file,) will be shared with the DCOO.

3. Specification objectives

The successful tenderer will be expected to:

- assist TMET to allocate its School Condition Allocation funding across its estates based on prioritised need over a 5-year rolling programme within the funding available.
- project manage schemes that require professional project management under the Construction, Design & Management Regulations 2015 and any subsequent legislation.
- provide advice and guidance on emergency reactive works as they occur, and other building works including a sustainability programme such as LED lighting, insulation, and solar panels.
- make proactive recommendations regarding TMET' estate, including asset management and estates options planning, including feasibility studies.
- recommend specialist contractors as required.

Locations

School	Phase	Address
Abbey Mead	Primary	109 Ross Walk Leicester, LE4 5HH
Brook Mead	Secondary – Free school due to open on a new permanent site in April 2025.	Permanent site TBC
Castle Mead	Secondary – Free School – Opened on new permanent site in September 2021.	Richard III Road Leicester LE3 5QT
Fosse Mead	Primary	Balfour Street, Leicester, LE3 5EA
Kestrel Mead (Split Sites)	Primary	Infant Building Maidenwell Avenue Hamilton Leicester LE5 1TG Junior Building Mundesley Road Hamilton Leicester LE5 1WE
Kibworth Mead	Secondary	Smeeton Road Kibworth Leicester LE8 0LG
Knighton Mead	Primary	Knighton Fields Road West Leicester LE2 6LG

North Mead	Primary	Northfield Road Leicester LE4 9DL
Orchard Mead	Secondary	Keyham Lane West Leicester LE5 1RT
Rowlatts Mead	Primary	Balderstone Close Leicester LE5 4ES
Rushey Mead	Secondary	Melton Road, Leicester, LE4 7AN
Thurnby Mead	Primary	Dudley Avenue, Thurnby Lodge, Leicester, LE5 2EG
Willowbrook Mead	Primary	Roborough Green, Thurnby Lodge, Leicester, LE5 2NA

4. Required Experience, Knowledge and Compliance

The successful tenderer must have sufficient understanding of the following areas to support with TMET' requirements under this contract:

- Trust estates strategies, project prioritisation and asset management.
- Trust funding and planning, particularly with regard to Education & Skills Funding Agency condition funding rules and School Condition Allocation funding, including how funding can be allocated and the timelines associated with School Condition Allocation funding.
- Public sector procurement regulations, policy and practice.

The above will be required to be demonstrated in the tender response, setting out evidence of experience. The successful tenderer shall be required to comply with the Good Estates Management for Schools (GEMS) advice outlined by the Department for Education.

The successful tenderer shall be responsible for procurement compliance under this contract and shall be required to fully ensure and evidence that all public sector procurement regulations and policies are followed in respect of any procurement/ tendering activity undertaken, or advice and guidance given, as part of the service provided under this contract.

The successful tenderer will ensure that meetings with TMET personnel shall always be attended by the relevant authorised, experienced and qualified personnel relating to the meeting subject, and any work undertaken under this contract, including any advice and guidance given, must be provided by appropriately qualified and experienced professionals with respect to the area of work in question.

5. Deliverables:

The successful tenderer will be expected to deliver the following:

Pre-start scheme consultations

Following receipt of and interpretation of our instructions, to provide a Contract Administrator Service and carry out such professional services as is reasonable in your professional judgement. This should include, but is not limited to:

- Ensure the TMET DCOO is included in all discussions regarding any scheme or potential scheme.
- Agree the final brief for any scheme with the DCOO.
- Advise TMET of its duties as Client under the Construction, Design & Management Regulations 2015, and any other relevant legislation.
- Advise TMET of where a need arises to employ additional consultants to make any required planning and building regulations applications, and to achieve the relevant consents.
- Advise TMET of the need to employ additional consultants (such as structural engineer, architect, mechanical and electrical consultant) to enable schemes to be developed and implemented.
- Develop outline scheme proposals, programme and budget costs and reach agreement with TMET on a preferred scheme.
- Assist any appointed consultants to help to facilitate a successful outcome under the planning and building regulations processes, and the design process.
- Advise on appropriate contract procedures and procurement methods to be adopted.

Planning applications

- An initial site visit to establish the design options and parameters to meet the aspirations of the school and needs of the locality.
- The production of outline drawings and feasibility cost estimates for the outline options.
- Advise TMET of the need to employ additional consultants (such as structural engineer, mechanical and electrical consultant) to enable the scheme to be developed.
- Meeting with the Planning Officer via the pre-application process where required, to establish if the options have any significant impacts in terms of gaining planning consent.
- Meeting with the DCOO and Head of Estates (and other school stakeholders where relevant) to discuss the options and establish a preferred option in terms of time, cost, and deliverability in relation to planning consent and other external factors.
- Advising on planning and building regulations for the scheme including producing and submitting the planning application and building regulations on behalf of TMET.
- Respond to any general queries raised by the Planning Officer as applicable.

Designer and Contract Administrator

Following completion of the pre-start scheme consultation role and on receipt of TMET' instructions to proceed, you should then undertake the role of Designer and Contract Administrator who would administer the contract and be the main point of contact with the contractor on TMET' behalf. This role would include:

A - Pre-Contract Stage

- Prepare final outline proposal drawings for the scheme.
- Prepare draft tender documents including the tender specification document, final proposal drawings, planning permission documents, services schedules etc, within given budgetary constraints.
- Advise TMET of the building regulations approval process and recommend whether to submit via the Local Authority Building Control Inspector or via an Approved Inspector.
- Advise TMET on risk management in relation to the scheme.
- If required, submit a building regulations application including preparation of application forms, plan drawings and supporting documentation.
- Respond to any general queries raised by the Building Control Officer or the Approved Inspector.
- Prepare recommendations for a tender list for our approval.

B – Tender Stage

- Prepare final tender documents and issue these to at least three contractors.
- Assess the tenderers' proposals and fixed price tender returns.
- Prepare a tender report providing recommendations of a preferred tenderer based on their tender returns and ability to meet the scheme requirements.
- Discuss the tender report with the DCOO.
- Once given approval to proceed, appoint the successful contractor and arrange completion of the contract documents.

C – Project Construction/Implementation Stage

- Arrange and chair pre-contract meetings on site to discuss the scheme requirements and the contract terms, including all other relevant stakeholders including the DCOO, Principal, Head of Estates, Academy Manager, and Premises Manager).
- Agree the retention fee as appropriate for each scheme.
- Regularly monitor progress and quality of works via site visits to ensure the contractor is meeting the requirements and timescale of the project.
- Attend formal site meetings (envisaged to be on a monthly basis) and issue Payment Certificates.
- Deal with day-to-day enquiries regarding the works and approvals in liaison with the DCOO/Head of Estates, to ensure the smooth running of the scheme.
- Ensure costs remain within budget (including contingency sums) unless unforeseen circumstances occur.
- Agree all contract variations and costs with the DCOO before issuing contract instructions to the contractor.
- Agree monthly valuations and certify payments to be made by TMET to the contractor.
- Inspect and prepare snagging lists as appropriate to avoid delays at Practical Completion.
- Ensure snagging issues are addressed before Practical Completion is issued.
- Be responsible for handover of the scheme, checking that all commissioning and testing has been carried out satisfactorily.
- Agree and recommend Practical Completion of the scheme to the DCOO and issue the relevant Practical Completion Certificate.
- Arrange for submission of all design details, as built information, warranties etc. by the Contractor.
- Agree the final account and certify payment to be made by TMET to the Contractor at Practical Completion.

- Liaise with and comply with the Principal Designer's requests regarding completion and handover of the Health & Safety File and the Operations & Maintenance manuals.

D – Rectification period

- Inspect the works prior to the end of the rectification period.
- Issue a Schedule of Defects as necessary and arrange for making good to those defects.
- Certify completion of all making good to defects.
- Certify payment of the retention sum at the end of the rectification period once all making good has been completed.

E – Information required by TMET

The successful tenderer will ensure that TMET is provided with the following information for each scheme before the scheme commences:

- Scheme specification.
- Tender report.
- Appointed contractor's insurance certificate, risk assessments and method statements.
- Signed contract.
- Where appropriate, final design layout signed off by TMET e.g.- for a new science laboratory layout.

The following documents will need to be provided during the scheme:

- Any contract variations
- Minutes of any meetings held between the building consultant, the contractor and/or TMET
- Payment certificates
- Invoices

Upon scheme completion, the following documents will need to be uploaded before the final contractor's/building consultancy's fees can be paid:

- Operations & Maintenance file
- Health & Safety file
- Plant commissioning documents (where applicable)
- Warranties (where applicable)
- Practical completion certificate

Example schemes

Examples of the types of schemes TMET expect to be carrying out over the next 2-3 years include:

- Drainage works.
- Electrical rewire.
- Fire door and fire alarm replacements.
- Boiler replacements.
- Roof replacements.
- Installation of PV panels, LED lighting and insulation.
- Windows and external doors replacement.

6. Advice and Guidance

TMET require the successful tenderer to provide a range of professional advice and guidance from suitably qualified and experienced personnel relevant to the specific advice or guidance required. The required advice and guidance may cover, but is not limited to, the following areas:

- emergency reactive and maintenance works.
- sustainability programme including LED lighting, insulation, and solar panels.
- recommendations regarding TMET' estate, including asset management and estates options planning, feasibility studies.
- Recommendation of specialist contractors as required.

7. Constraints

The successful tenderer will ensure the following:

- That TMET' decision on any colour/material choices (eg for flooring, decorating etc), are made before the pre-start on site meeting to mitigate against any unnecessary delays once the scheme commences.
- That contractors' Refurbishment & Demolition asbestos surveys are factored into the project timescale and do not cause an unnecessary delay at the start of the scheme.
- That all contractors' employees/operatives have a valid Enhanced DBS certificate, details of which are supplied to the school's Office Lead at least once a week before commencing work on any TMET sites. This will be a requirement of each scheme tender process and contractors who are unable to meet this requirement should not be invited to tender. It should be noted that employees/operatives who do not have an Enhanced DBS certificate will not be permitted to work on any TMET site.
- That opening times and days for any works will be agreed with the school's Site Manager before the scheme commences. This may include working evenings and/ or weekends. At least 3 days' notice must be given to the school for any out of hours working.
- Arrangements for any contractor containers/welfare facilities will be delivered and removed on agreed dates prior to the start of the scheme.
- That contractors will take full responsibility for storage of their materials on TMET sites.
- That any visits by the successful tenderer to TMET sites to meet with any TMET staff will be agreed in advance with the DCOO or Head of Estates and, if necessary, arrangements made with the school directly for use of a meeting room. (Visits to site by the successful tenderer to meet with contractors only do not need to be arranged in advance)
- That the DCOO will be informed of any delays as soon as they become apparent to the scheme timescale e.g.- delay in tenders being returned, or programme delay once works have commenced.
- That any requests by TMET to the successful tenderer to contact a contractor working on a scheme are actioned within 2 days (or 1 day for urgent matters).
- That all reasonable skill, care and diligence in performance of their duties under their contract with TMET are performed by the successful tenderer.
- That the successful tenderer has in place a suitable management structure and level of resource to deliver the objectives required by TMET.
- The successful tenderer will ensure that all personnel and other persons providing services to TMET are at all times properly and sufficiently qualified, competent, skilled, honest, experienced, instructed and supervised as required.

- The successful tenderer will have in place effective business continuity procedures in place.
- The successful tenderer will provide TMET with a comprehensive complaints procedure. Any complaints will be submitted in writing and must be logged, investigated and resolved in a timely manner; written complaints to be acknowledged and responded to in writing within 5 working days.

8. Specific reports, meetings, and frequency

The successful tenderer will be expected to:

- Provide a tracking document for all schemes with relevant dates and information.
- Have a fortnightly TEAMS meeting with the DCOO to discuss progress on each scheme on the tracker and any emerging matters.
- Attend meetings at school sites when required.
- Ensure consultancy reports are forwarded to the DCOO within 3 days of receipt by the successful tenderer.
- To respond to any e-mail marked “Urgent” from TMET within 24 hours.
- To respond to all other e-mails within 3 days.

9. Questions and clarifications

If you have any questions or points of clarification about the contents of the Bid document or the services that are to be provided, please contact TMET by emailing gkirkham@tmet.uk. TMET will respond to all queries by using the template Appendix A Questions and Clarifications Template by the date shown below to all bidders for transparency.

The Mead Educational Trust will not answer any questions received via telephone and will not answer any questions received after this date. Any questions received will be answered and circulated to all Bidders, although The Mead Educational Trust will not disclose the identity of the Bidder who asked the question.

Clarifications deadline : 03/10/2024 @ 12pm Clarification response deadline : 07/10/2024 @ 5pm

10. Completing Bids

Your bid should contain all of the required information outlined within this document, along with any further information you feel relevant to support your bid. Any comments pertaining to the information supplied by you may be made in an email and returned with the Bid.

11. Submission of Bid

Please submit one electronic copy of the completed Bid document by email to gkirkham@tmet.uk by 12:00pm on 11/10/2024.

The electronic bid submissions will be held securely and only viewed after the deadline date. Any electronic bids received after these dates and times will not be considered.

12. Evaluation criteria

The Trust will select the best value for money tender considering the following factors (not listed in order of importance):

- Technical expertise.
- Approach to reviewing School Condition Survey data and wider Trust priorities, in order to provide a transparent recommendation with a clear methodology, for the use of SCA funding.

- Management of projects to ensure they run to programme and keep the Trust Schools compliant, including quality assurance.
- Management and sourcing of skilled, competent contractors who understand the needs of a school environment.
- The value to be provided from the Trust and company's relationship, including relevant insights, opportunities to achieve energy saving improvements, supporting the Trust to maintain safe and inviting environments for our young people and staff.
- The value for money of the proposal.

Each factor will be marked between 0 and 5 except Costs:

Assessment	Points
Very poor Response provides no confidence of ability to undertake and deliver the service, and/or no supporting evidence.	0
Poor Response provides limited confidence of ability to undertake and deliver the service, and/or limited supporting evidence	1
Satisfactory Response provides confidence of ability to undertake and deliver the service, and/or sufficient supporting evidence	3
Good Response provides high confidence of ability to undertake and deliver the service, and/or considerable/comprehensive supporting evidence	5

Evaluation of the Cost
<p>Cost will be marked as follows:</p> <p>Cheapest to receive 5 points.</p> <p>Within 110% of the cheapest quote – 4 points.</p> <p>Within 120% of the cheapest quote -3 points.</p> <p>Within 130% of the cheapest quote- 2 points.</p> <p>Within 140% of the cheapest quote-1 point.</p> <p>All other costs will be awarded 0 points.</p> <p>EG. The cheapest price is £20,000. The next cheapest price is £23,250.</p> <p>110% of cheapest price is £22,000.</p> <p>120% of the cheapest price is £24,000 so the next cheapest would be within 120% and be awarded 3 points.</p>

13. Project Work

It is expected as part of the contract that 3 hours of free advice and guidance be given to TMET each week when and if required.

We are willing to consider different options for pricing for advice and guidance. Please complete the options below that you would be willing to consider:

Option	Description	Comments
1	Annual retainer fee for unlimited advice and guidance	Cost to be reviewed annually during the contract period
2	Annual retainer fee for limited amount of hours of advice and guidance each month* [Insert number of hours here:]	Cost to be reviewed annually during the contract period
3	Hourly rate for advice and guidance*	Cost to be reviewed annually during the contract period

* Over and above the 3 free hours per week

Other services, such as structural surveys and planning applications to be charged on an individual scheme basis.

14. Contract

The contract will be for 3 years commencing on 01st December 2024. There will be an option of two further one-year extensions.

15. Timetable for Bid and award of Contract

The intended timetable is:

01/10/2024	Invitation to Tender document and associated documents issued to selected companies and uploaded to TMET website.
03/10/2024 at 12pm	Tenderers submit questions and comments regarding Tender documents.
07/10/2024 @ 5pm	The Mead Educational Trust responds to questions and comments via email to all Tenderers.
11/10/2024 @ 12pm	Bidders submit Tender.
14/10/2024 – 01/11/2024	Selected Bidders invited to present following evaluation of Tenders and unsuccessful Bidders not invited to present will be notified.
By 15/11/2024	Following TMET Executive approval - Appointment of Preferred Bidder and next steps agreed with Preferred Bidder. Unsuccessful Bidders will be notified.

List of Appendices

- Appendix A: Tender return: information from the company (Bidder to Complete)
- Appendix B: Questions and Clarifications Template - TMET to complete for all bidders

Appendix A - Tender return: information from the company

Details of education sector experience, technical expertise and credentials to take on this role

CVs and relevant experience of named project manager and other key staff

Approach to reviewing condition data and wider Trust priorities, in order to provide a transparent recommendation with a clear methodology, for the use of SCA funding

Management of projects to ensure they run to programme and keep the Trust Schools compliant, including quality assurance procedures

What you bring to the relationship, including relevant insights, opportunities to achieve energy saving improvements, supporting the Trust to maintain safe and inviting environments

Examples of SCA projects you have delivered for similar-size Trust

Contract value	Project management % fee	M&E engineering % fee	Quantity surveying % fee	CDM % fee
£0 - £50,000				
£50,0001 - £100,000				
£100,001 - £200,000				
£200,001 - £300,000				
£300,001 - £450,000				
£450,001 - £600,000				
£600,001 - £800,000				
£800,001 - £1,200,000				
£1,200,001 - £1,500,000				

Details of value-added support offered as part of the fee

Additional reasons for selection – why choose you?

Confirmation of no conflict of interests

Names and contact details of two references