

**Invitation to Tender for the Provision of:**

Professional Estates Consultancy Services Framework

Contract Reference: UWTSD2526/2231

Document 2: Tender Specification

Issue Date: 08/08/2025

**Contents**

[1 Proposed Procurement Timetable. 2](#_Toc205559931)

[2 Overview 2](#_Toc205559932)

[3 Framework Information 3](#_Toc205559933)

[4 Duration of Framework Agreement 3](#_Toc205559934)

[5 Access to the agreement 4](#_Toc205559935)

[6 Background Information 4](#_Toc205559936)

[6.1 University of Wales Trinity Saint David 4](#_Toc205559937)

[6.2 Coleg Sir Gâr 4](#_Toc205559938)

[6.3 Coleg Ceredigion 5](#_Toc205559939)

[6.4 Pembrokeshire college 5](#_Toc205559940)

[7 Campus Locations 5](#_Toc205559941)

[University Of Wales Trinity Saint David 5](#_Toc205559942)

[Coleg Sir Gar 5](#_Toc205559943)

[Coleg Ceredigion 5](#_Toc205559944)

[Pembrokeshire College 5](#_Toc205559945)

[8 Combined Liability Insurance 5](#_Toc205559946)

[9 Scope of Requirement and Framework Structure 6](#_Toc205559947)

[10 General information 6](#_Toc205559948)

[10.1 Staffing 6](#_Toc205559949)

[10.2 Skills, Knowledge, and Expertise 6](#_Toc205559950)

[10.3 Legislation 6](#_Toc205559951)

[10.4 Service Management 6](#_Toc205559952)

[10.5 Exit Strategy 7](#_Toc205559953)

[10.6 Business Continuity 7](#_Toc205559954)

[10.7 Sub-Contractors / Consultants 7](#_Toc205559955)

[11 Guidance for Calling-off from the Framework Agreement 7](#_Toc205559956)

[11.1 Call-Off Process 1 - Mini-Competition 8](#_Toc205559957)

[11.2 Call-Off Process 2 - Direct Award (Rotation Based) to below threshold for goods and services 8](#_Toc205559958)

[11.3 Call-Off Process 3 - Desktop Exercise 8](#_Toc205559959)

[12 Key Performance Indicators 9](#_Toc205559960)

[13 Supplier Sustainability Action Plan 9](#_Toc205559961)

[14 Community Benefits 10](#_Toc205559962)

[15 Tender Evaluation Criteria 11](#_Toc205559963)

[15.1 Capacity and Capability Assessment, For Lot 1 Only 12](#_Toc205559964)

[15.2 Capacity and Capability Assessment, For Lot 2 14](#_Toc205559965)

[16 Appendix B – Pricing Schedule 17](#_Toc205559966)

|  |
| --- |
| **Mesur Gymraeg (Cymru) 2011**  Os hoffech dderbyn y dogfennau tendro yn y Gymraeg, cysylltwch â [procurement@pcydds.ac.uk](mailto:procurement@pcydds.ac.uk).  Gallwn ystyried cyflwyniadau yn Gymraeg, gan na fydd y rhain yn cael eu trin yn llai ffafriol na thendr a gyflwynir yn Saesneg.  **Welsh Language (Wales Measure) 2011**  If you wish to receive the tender documents in the Welsh Language, please contact [procurement@uwtsd.ac.uk](mailto:procurement@uwtsd.ac.uk).  We are able to consider submissions in Welsh, as these will be treated no less favourably than a tender submitted in English. |

# Proposed Procurement Timetable.

|  |  |
| --- | --- |
| **Tender Notice placed on Sell2Wales** | 08th August 2025 |
| **Tender Return Date** | Noon, 15th September 2025 |
| **Tender Award** | 26th h September 2025 |
| **Contract Start** | October 2025 |

**The University aims, but does not commit, to adhere to the above timetable.**

**Please do not contact the University for updates on the progression of the tender process. All suppliers will be notified by email at each stage.**

# Overview

|  |  |
| --- | --- |
| **Procuring Authority:** | University of Wales Trinity Saint David Group (UWTSD), and Pembrokeshire College |
| **Title:** | Property Consultancy Framework |
| **Procedure:** | Open Framework |
| **Framework Agreement Start:** | October 2025 |
| **Type of Contract:** | Open Framework Agreement |
| **Framework Type & Duration:** | The proposed Framework Agreement is intended to run for an initial period of 4 years, with the option to extend for a further 4 years, giving a maximum duration of 8 years. In line with the principles of openness and competition, there is also a provision to allow new suppliers to join the framework during year 3 and again in year 6.  There will be no guarantee of business or volume of purchases even if you are selected as an approved supplier.  This contract will be accessible by the following:   * University of Wales Trinity Saint David * University of Wales * Coleg Sir Gâr * Coleg Ceredigion * Pembrokeshire College |
| **The number of envisaged contractors per LOT:** | A maximum of 8 suppliers will be appointed to each LOT, subject to receiving a sufficient number of admissible tenders for both LOTs within the agreement. |
| **Maximum Estimated Expenditure:** | £3M across all 2 (two) LOTS over the complete duration of the contract.  There will be no guarantee of business or volume of purchases even if you are selected as an approved supplier. |
| **Framework LOTS:** | This tender is divided into 2 (Two) Lots:   * Lot 1 – General Project Management and Estates Services Consultancy * Lot 2 – Property Consultancy Services |
| **Consortia:** | Not permitted. |
| **Subcontracting:** | By request only |
| **Tender Submission Methods:** | Applicants are required to submit their proposals electronically via the Sell2Wales Portal.  Tenders submitted in any other way (e.g., email or by letter) will be disregarded. |
| **Post Award Call Off:** | See Section 11 of this document for more guidance. |

# Framework Information

The University of Wales Trinity Saint David (UWTSD) Group and Pembrokeshire College wish to establish an Open Framework Agreement for the Provision of Professional Estates Consultancy Services. The Framework Agreement is divided into two (2) Lots:

Lot 1 - General Project Management and Estates Consultancy Services

Lot 2 – Property Consultancy Services

The Group intends to appoint a maximum of **Eight (8)** Consultants per Lot.

Tenderers may submit responses for one or both Lots, provided they have the capacity and capability to meet the requirements of each Lot. Tenderers must clearly indicate which Lot(s) they are bidding for.

Each Lot will be evaluated independently, on an individual Lot Basis.

This procurement is being conducted via the Sell2Wales portal. All relevant documents, including the Invitation to Tender (ITT) and associated materials, are available exclusively in electronic format through the Sell2Wales website.

The procurement process will follow the Open Framework Procedure, as outlined in the Procurement Act 2023.

The ITT and its associated materials have been structured to ensure fair and equal treatment of all tenderers. Bidders must adhere to the specified format and order when completing their responses to enable consistent evaluation.

Bidders are advised to read the entire ITT carefully prior to submission. Failure to follow the instructions for completion or submission may result in disqualification from the process.

# Duration of Framework Agreement

The Framework Agreement will commence in **October 2025** for a period of four (4) years, with the option to extend for a further four (4) years, giving a maximum duration of eight (8) years. In line with the principles of openness and competition, there will be an opportunity for new suppliers to join the Framework during year 3 and again in year 6.

# Access to the agreement

The following institutions will have access to this Framework Agreement. However, it should be noted that use of the Framework is optional, and there is **no guarantee of work** arising from inclusion on the Framework. Each institution reserves the right to procure services outside of this Agreement if they choose to do so.

* University of Wales Trinity Saint David
* University of Wales
* Coleg Sir Gâr
* Coleg Ceredigion
* Pembrokeshire College

Each named Institution may join the Framework Agreement at any point during its term, which may occur as existing contractual arrangements come to an end. As a result, participation in the Framework may be phased in over time.

Please note that call-offs can be made by a named Institution at any time prior to the expiry of the Framework Agreement, and the duration of a call-off contract can exceed beyond the end date of the Framework Agreement itself.

# Background Information

## University of Wales Trinity Saint David

The University of Wales Trinity Saint David (UWTSD) is a multi-campus university in Wales, with main locations in Swansea, Carmarthen, and Lampeter, along with additional sites in London and Birmingham. Formed in 2010 through the merger of the University of Wales, Lampeter, and Trinity University College, it later incorporated Swansea Metropolitan University, expanding its reach and academic offerings.

UWTSD provides a diverse range of undergraduate and postgraduate courses across various disciplines, including humanities, business, engineering, education, creative arts, and digital technologies. The university has a strong emphasis on employability, entrepreneurship, and industry collaboration, ensuring that students gain practical skills alongside their academic studies.

With a deep-rooted history dating back to the founding of St David’s College, Lampeter, in 1822, UWTSD blends academic tradition with modern innovation. It maintains strong partnerships with further education institutions, such as Coleg Sir Gâr and Coleg Ceredigion, enhancing access to higher education across Wales. The university is also committed to sustainability, community engagement, and supporting Welsh language and culture, making it a key contributor to education and development in the region.

## Coleg Sir Gâr

Coleg Sir Gâr is a further education college in Wales, with multiple campuses across Carmarthenshire, including Llanelli, Ammanford, Carmarthen, and Llandeilo. The college provides a diverse range of academic and vocational courses, from A-levels and apprenticeships to higher education and industry-specific training.

Formed through the merger of several educational institutions, Coleg Sir Gâr has established itself as a key provider of education and skills training in West Wales. It maintains strong links with local industries, particularly in agriculture, engineering, creative arts, and sports, ensuring students receive practical, career-focused learning experiences.

## Coleg Ceredigion

Coleg Ceredigion is a further education college in West Wales, with campuses in Aberystwyth and Cardigan. It offers a wide range of academic and vocational courses, including A-levels, apprenticeships, and industry-specific training, catering to students of all backgrounds and career aspirations.

Coleg Ceredigion is also committed to student support and community engagement, fostering a welcoming and inclusive learning environment. Through its partnership with the University of Wales Trinity Saint David, the college provides higher education opportunities, ensuring that learners in Ceredigion have access to a broad and flexible range of study options.

## Pembrokeshire college

Pembrokeshire College is the largest further education provider in Pembrokeshire, Wales, offering a wide range of academic, vocational, and apprenticeship courses. Based in Haverfordwest, the college serves students from across the region, providing qualifications from entry-level to degree-level in partnership with universities such as the University of Wales Trinity Saint David.

The college has strong links with local industries, particularly in sectors like marine engineering, renewable energy, construction, tourism, and health and social care. Its focus on hands-on, career-focused learning ensures students gain the skills and experience needed for employment or further study.

Pembrokeshire College is also known for its commitment to innovation, sustainability, and student support, fostering an inclusive and dynamic learning environment. With state-of-the-art facilities and industry-led training programs, it plays a vital role in the educational and economic development of West Wales.

# Campus Locations

The University Group has campuses located in the following locations:

|  |  |
| --- | --- |
| University Of Wales Trinity Saint David  * Carmarthen * Swansea * Lampeter * Cardiff * Birmingham * London | Coleg Sir Gar  * Llanelli * Carmarthen * Ammanford |
| Coleg Ceredigion  * Aberystwyth * Cardigan | Pembrokeshire College  * Haverfordwest |

**Please can it be noted that Consultants shall be expected to be capable and willing of covering all locations within the scope of the Framework Agreement.**

# Combined Liability Insurance

It is a requirement of this Contract that the appointed Contractor should be insured against Employers Liability, Public Liability, Contractual Liability, and Fidelity Guarantee in accordance with the following schedule:

|  |  |
| --- | --- |
| **Employers Liability** | Limit of Indemnity - £10,000,000 |
| **Public Liability** | Limit of Indemnity - £5,000,000 |
| **Professional Indemnity** | Limit of Indemnity - £1,000,000 |

(UWTSD will only contract with an organisation that holds the required levels of insurance as set out above, or those who are willing to bring these levels into effect for the contract start date).

# Scope of Requirement and Framework Structure

The Framework Agreement is divided into two (2) Lots.

Further details on the specific scope of requirements for each Lot are provided in the following appendices:

Please refer to the following appendixes for further information on the scope of requirements for the specific lots.

|  |  |
| --- | --- |
| Lot 1, General Project Management and Estates Services Consultancy.  Scope of Requirements File | Appendix 1 |
| Lot 2, Property Consultancy Services.  Scope of Requirements File | Appendix 2 |

The Appendices are available via Sell2Wales, as separate documents.

# General information

**Please note that the following aspects are applicable to Lot 1 and Lot 2.**

## ****Staffing****

Consultants are expected to ensure they have sufficient management and technical resources available throughout the duration of the Framework to ensure that service provision is efficiently managed and delivered to the required standards, in line with the Lot specific Scope of Requirements.

Management staff must possess suitable strategic and operational contract management skills, as well as the expertise necessary to manage the ongoing service provision. They are also responsible for ensuring effective customer relationship management with all institutions.

Additionally, Consultants should demonstrate that they have the necessary skills and processes in place to prevent any disruption in service levels in the event of staff absence or changes during the Framework Agreement.

## ****Skills**, **Knowledge**, **and** **Expertise****

The Consultant must be able to identify and focus on key problems and issues that need to be addressed and managed. Furthermore, they should be capable of communicating complex issues in a clear and understandable manner.

The Consultant must also be able and willing to assist in facilitating decision-making when required.

## ****Legislation****

The Consultant must ensure that all services are provided in compliance with all relevant legislation and regulations.

## ****Service Management****

For all call-off contracts under the Framework Agreement, the Consultant must:

* Provide an email address and phone number for all initial and ongoing communications, and respond promptly.
* Appoint a named point of contact and a deputy for the duration of the contract. If either contact changes, a suitably qualified and experienced replacement must be provided. The Authority’s Contract Manager may request an alternative replacement with justification.
* Be available to attend meetings either in person or via Teams, including at short notice, and show flexibility where possible.
* Adhere to all timescales set by the institutions in line with the project requirements.

## ****Exit Strategy****

Upon completion of services, a full and complete handover, including knowledge transfer, will be required from the Consultant, which may also involve coordination with other external parties. All documents, files, plans, and information must be handed over in a timely manner.

Intellectual property rights may apply and will be discussed and agreed upon on a case-by-case or project basis. However, any documentation or information originating from the institutions will remain their intellectual property at all times.

## ****Business Continuity****

The Consultant must maintain an up-to-date and robust business continuity plan to ensure operations can continue in the event of any unforeseen circumstances, such as IT issues, fire, flood, health pandemics, etc. These plans should outline how any impact will be minimised and resolved.

## Sub-Contractors / Consultants

It is expected that Consultants have a sound and effective process in place for selection of suitably qualified and skilled sub-contractors / consultants.

Any such sub-contract / outsource arrangements should be carried out without any additional cost to the Group, unless specifically agreed by them prior to the commencement of the Framework Agreement.

Any subsequent changes to any sub-contract / outsource arrangement must be approved by the Group prior to the date of change. The Group reserves the right to refuse any changes in sub-contract/outsource relationship.

Consultants are responsible for the performance of all Subcontractors/Consultants used for delivery of the Framework Agreement. All sub-contractors / consultants must comply with the terms of this Framework Agreement.

The contractor / consultant shall ensure any sub-contractors used in the delivery of the Framework Agreement shall adhere to authorities’ policies and procedures.

# Guidance for Calling-off from the Framework Agreement

Call-off from the Framework Agreement is by means of Mini-Competition, Direct Award (by rotation) or Desktop Exercise.

The call-off process for awarding call-offs s under the Framework will follow one of these three (3) principal selection methods.

## Call-Off Process 1 - Mini-Competition

Mini competitions can be utilised where tender documentation is issued to all framework Consultants appointed in a specific lot to which the project relates.  The criteria applied to the scheme and their weightings will be set out in the mini-tender documentation.

## Call-Off Process 2 - Direct Award (Rotation Based) for below threshold goods and services

Under Call-off Process 2, the Institution can make a direct award without a mini competition, if the following conditions are met:

* The estimated project value is below the Procurement Act 2023, the public procurement thresholds for goods and services £214,904.
* The funding stream allows for a direct award.

Suppliers are ranked within each lot, and contracts are awarded in rotation.

* The first project goes to the top-ranked supplier, the next to the second, and so on.
* Once all suppliers have had a turn. Then the rotation starts again.
* If a supplier is unable to accept work (due to capacity, timescale, or valid reasons such as conflict of interest), the next supplier in the rotation will be approached.

All contracts will follow the Standard Terms and Conditions set out in the Framework Agreement. For longer-term contracts, instructions will be issued as necessary for each assignment.

## Call-Off Process 3 - Desktop Exercise for below threshold goods and services

Where time is critical and UWTSD / College staff are satisfied with the standard call-off contract terms (with no need for amendments), the evaluation criteria may be adjusted using a desktop calculator to better reflect local requirements.

* Each criterion’s weighting can be adjusted by up to 20 percentage points, provided the total weighting remains 100%.
* For example, if quality was originally weighted at 30%, it can be varied between 10% and 50%.
* The overall scores will then be recalculated using the adjusted weightings, and the contract awarded to the highest-scoring supplier.

# ****Options****

UWTSD reserves the right to exercise options during the contract period. These options may include, but are not limited to:

* The purchase of additional goods or services of a similar nature to those specified in the core contract
* The extension of the scope of services to meet evolving operational needs
* Adjustments to quantities, delivery schedules, or service locations
* Extension of the contract period (where applicable)

Any options exercised will be within the overall maximum contract value stated in the procurement documents. The inclusion of options does not guarantee any additional spend beyond the core contract.

# Key Performance Indicators

To ensure the effective delivery and sustained performance of the Framework, the Authority will establish a set of Key Performance Indicators (“KPIs”). These KPIs will provide clear, measurable benchmarks against which the Service Provider’s performance will be monitored, assessed, and reported throughout the term of any Call-Off Contracts.

Performance against the KPIs will be reviewed at agreed intervals as part of the Authority’s contract management process. The purpose of these reviews will be to drive continuous improvement, ensure transparency, and maintain alignment with the University of Wales Trinity Saint David’s (“UWTSD”) strategic objectives.

|  |  |  |  |
| --- | --- | --- | --- |
| **KPI** | **Measurement** | **Target** | **Verification Method** |
| **Delivery Performance (Time & Budget)** | Percentage of project milestones, consultancy reports, and deliverables submitted on or before agreed deadlines and delivered within ±5% of agreed budgets or cost forecasts. | >95% of deliverables to meet both time and budget criteria. | Reviewed against Project Timeline and Budget Reports at Quarterly Review Meetings/ or project completion. |
| **Social Value Delivery** | Fulfilment of social value commitments made at contract award (e.g., apprenticeships, local supply chain engagement, sustainability initiatives). | 100% delivery of stated commitments. | Annual Framework Review. |
| **Direct Award Acceptance Rate** | Percentage of Direct Award Call-Off opportunities offered to the Supplier that are formally accepted within the specified response timeframe. | >85% acceptance rate. | Annual Framework Review. |

# Supplier Sustainability Action Plan

In response to the measures implemented by the UK Government, the UWTSD Group expects prospective bidders to demonstrate their commitment to this target by creating their own Sustainability Action Plan.

We will be using the NET Positive Supplier Engagement HE Tool, which enables suppliers to the Education sector to create a simple, free sustainability action plan for your business; this plan will form part of our ongoing contract management discussions moving forwards. The tool also addresses issues raised by the Modern Slavery Act, which is new legislation universities are required to report against; your responses will form part of our annual report.

Link: <https://supplierengagementhe.net-positive.org/>

Sustainability Action Plans which are submitted via the HE Tool will be available to all Higher Education institutions, so you only need to complete it once.

If you require more guidance in relation to the above, please visit their website.

Bidders who are awarded a contract will be required to commit to signing up to the NET positives tool within 6 months of contract award.

# Community Benefits

The UWTSD Group are committed to promoting Sustainable Development through its policies, strategies and services, thus achieving best value for money in the widest sense. The aim is to build stronger communities, reduce social exclusion and poverty and encourage the development of the economy. In delivering this project, we will be pursuing Community Benefits to contribute to the social, economic and environmental well-being of the wider community.

As part of the submission, the Service Provider shall outline their approach to how their proposal shall improve the economic, social and environmental well - being of the Campuses, its staff and students. This should outline how the proposal fits with Welsh Government’s Sustainable Procurement objectives.

Service Providers are expected to consider how they might provide community benefits through its engagement and delivery of the contract and should prepare a community benefits plan.

Examples of Community benefits

The following list are examples community benefits that might be applied to such a scheme;

* Work Experience for Students
* Student talks
* Sponsorship and donations.
* Maximizing opportunities for smaller / more local service providers for sub-contract or supply-chain opportunities.

# Tender Evaluation Criteria

Tender submissions will be assessed on the basis of both quality and price with the following weighting:

**Appendix A - Quality: 70%**

**Appendix B - Price: 30%**

The following scoring matrix will be used to evaluate received bids;

|  |  |  |
| --- | --- | --- |
| **ASSESSMENT** | **DESCRIPTION** | **SCORE** |
| **Outstanding** | **Exceeds** the requirement with significant additional benefits.  In addition to demonstration by the Bidder of the relevant ability, flexibility, understanding, skills, resource and quality measures required to provide the services, the response identifies factors that will offer significant potential added value. Significant evidence provided to support the response. | **10** |
| **Excellent** | Response meets all requirements while providing full evidence to support the response with additional value and benefits and a high level of confidence. | **9** |
| **Very Good** | Response meets all requirements with a good evidence base and some added benefits. | **8** |
| **Good** | Response meets all requirements to the minimal level required. No concerns. | **7** |
| **Competent** | Response is complete and meets all minimum requirements. Some minor concerns. | **6** |
| **Acceptable** | Response meets all minimum requirements, but with concerns. | **5** |
| **Satisfactory** | Response is complete but fails to provide adequate evidence that all minimum requirements can be satisfied. | **4** |
| **Less than Satisfactory** | Response is complete but fails to satisfy all minimum requirements and fails to provide adequate evidence that these requirements can be satisfied. | **3** |
| **Inadequate** | Response is partly complete, some non-compliance and fails to meet some minimum requirements. | **2** |
| **Unacceptable** | Response is incomplete, non-compliant, fails to meet any minimum requirements and provides no evidence base. | **1** |
| **No Response** | No submission was made. | **0** |

You are required to respond to the criteria by number and in the order in which they are presented below.

Failure to follow the given format may negatively impact your submission.

When completing your responses,

* please refrain from sending generic or marketing materials.
* The University requires clear, written responses that directly address the specified evaluation criteria.

Your responses should also demonstrate any added value or value for money your organisation can offer in relation to the scope of services to be delivered, if successful.

Each Pre-Qualification response will be evaluated on a Pass / Fail basis:

Information provided will be assessed on a Pass / Fail basis, where:

* Pass = Meets requirements as stated in this document
* Fail = Does not meet requirements as stated in this document

The Fail criteria for each aspect is confirmed within the below table.

If you wish to bid for both Lots 1 and 2, you must provide responses to both sets of Quality Questions, but you will only be required to provide the Pre-Qualification information once.

## Capacity and Capability Assessment, For Lot 1 Only

Completion of the Lot 1 Capacity and Capability Assessment is only required if you intend to bid for Lot 1.

Please ensure your responses refer to the Lot-specific Scope of Requirements.

If you wish to bid for both Lots 1 and 2, you must provide responses to both sets of Quality Questions.

Weightings for the quality of the submission will be applied in accordance with the table below:

|  |  |  |
| --- | --- | --- |
| **Pre-Qualification** | |  |
|  | **Appendix A (Lot 1) Please include with you submission** | **Pass / Fail** |
| **Capacity and Capability Assessment, Lot 1** | | **Weighting %** |
| **Lot 1, Q1** | **Personnel Experience**  Tenderers are asked to demonstrate the experience of their staff by providing:   * An example of a successfully delivered project * An example of an unsuccessfully delivered project, including a summary of lessons learned   This should relate to projects involving:   * Design and specification development * Contractor/consultant management and administration   When describing success or failure, consider factors such as budget, timelines, and performance. Examples can be drawn from the education sector or the wider public sector. | **30%** |
| **Lot 1, Q2** | **Reporting and Project Management**  Please outline your approach to reporting and project management for call-off contracts of varying sizes, demonstrating how your methods scale according to project size.  Please include a sample report from a recent project to illustrate your approach.  This should cover projects involving:   * Design and specification development * Contractor/consultant management and administration   Your response should include, but not be limited to:   * Communication methods and frequency * Reporting tools and systems used * Project management practices to keep work on schedule, including milestone tracking * Handover procedures at project completion, including how snagging is managed * Key considerations you prioritise in your reporting approach * Reporting areas covered, such as health and safety, welfare, and subcontractor/consultant performance * Participation in site meetings, including the provision of formal minutes or updates. | **50%** |
| **Lot 1, Q3** | **Added Value**  Can you please provide details of any other goods / services / benefits your organisation could offer, over and above the core requirements of this brief, that will add value to your proposal. | **10%** |
| **Lot 1, Q4** | **Community Benefits**  Please provide a short plan outlining how your organisation will contribute to the local and university community through this contract. Suggestions include student engagement, support for local suppliers, or staff development opportunities. | **10%** |

## Capacity and Capability Assessment, For Lot 2

Completion of the Lot 2 Capacity and Capability Assessment is only required if you intend to bid for Lot 2.

Please ensure your responses refer to the Lot-specific Scope of Requirements.

If you wish to bid for both Lots 1 and 2, you must provide responses to both sets of Quality Questions.

Weightings for the quality of the submission will be applied in accordance with the table below:

|  |  |  |
| --- | --- | --- |
| **Pre-Qualification** | |  |
|  | **Appendix A (Lot 2) Please include with you submission** | **Pass / Fail** |
| **Capacity and Capability Assessment, Lot 2** | | **Weighting %** |
| **Lot 2, Q1** | **Personnel**  Please fully detail your company’s personnel skills and capability to demonstrate how your company can meet the requirements of the University and its’ Academic Partners and the varied nature of their Estates as set out in the documentation, relevant to Lot 2.  Responses should include but not be limited to:   * Any relevant qualifications and accreditation held * Areas of specialism or specialist knowledge in relation to: * Estate management * Sales and acquisitions * Professional advice regarding title deeds and boundary disputes * Rent reviews, lease enquiries and negotiations (with UHI acting as either the landlord or tenant) * Valuation surveys, including market and insurance valuations | **50%** |
| **Lot 2, Q2** | **Methodology**  Please provide information on staffing levels and capacity to meet the needs of the University and its’ Academic Partners. Please note that details of staff specific to disciplines within the scope of Lot 2 should be referred to:   * Estate management * Sales and acquisitions * Professional advice regarding title deeds and boundary disputes * Rent reviews, lease enquiries and negotiations (with UHI acting as either the landlord or tenant) * Valuation surveys, including market and insurance valuations   You are specifically requested to bear in mind competing Institutional demands may need to be met simultaneously. | **30%** |
| **Lot 2, Q3** | **Added Value**  Can you please provide details of any other goods / services / benefits your organisation could offer, over and above the core requirements of this brief, that will add value to your proposal. | **10%** |
| **Lot 2, Q4** | **Community Benefits**  Please provide a short plan outlining how your organisation will contribute to the local and university community through this contract. Suggestions include student engagement, support for local suppliers, or staff development opportunities. | **10%** |

If bidder is bidding for lot 1 and lot 2, please provide responses to both sets of quality questions.

# Appendix B – Pricing Schedule

**Please read this section carefully and complete all parts in full.**

Bidders must clearly outline the range of activities and time required to deliver each work package, along with a full breakdown of associated costs.

All costs must be inclusive of any charges to the University, including but not limited to consumables, travel, printing, and other related expenses.

A Working Day is defined as a minimum of 8 hrs.

If you are bidding for both lots, you must submit a completed pricing schedule for each lot.

Bidders must return the form in the format provided, using the spaces to give detailed information on the works to be undertaken.

The lowest total price (i.e. the sum of all cost elements) will receive full marks, with other bids scored on a pro-rata basis.

Where no cost information is provided, the average cost from other qualifying tenders for that item will be used.

**All prices to be excluding VAT.**

|  |  |
| --- | --- |
| **UWTSD2526/231. Appendix B - Pricing Schedule** | Available via Sell2Wales as a separate file, for ease of access. |

That Lot will be entered and used in the commercial evaluation.

For example, if three responses are received and:

* Bidder A quotes £75,000
* Bidder B quotes £80,000
* Bidder C quotes £90,000

Then, assuming the commercial weighting is 20%, the scores will be calculated as follows:

* Bidder A Score = (£75,000 / £75,000) × 20 = 20.00%
* Bidder B Score = (£75,000 / £80,000) × 20 = 18.75%
* Bidder C Score = (£75,000 / £90,000) × 20 = 16.67%