

**BIRMINGHAM CITY COUNCIL**

**CABINET MEMBER**

**TUESDAY, 27 JUNE 2023 AT 00:00 HOURS**  
**IN CABINET MEMBERS OFFICE, COUNCIL HOUSE, VICTORIA**  
**SQUARE, BIRMINGHAM, B1 1BB**

**A G E N D A**

**3 - 22**

- 1 **ANGLESLEY PRIMARY SCHOOL - REPLACEMENT HEATING SYSTEM**  
**CAPITAL WORKS FBC & CONTRACT AWARD**

Report of Director of Children & Families



**Birmingham City Council**  
**Report to Cabinet Members for Children,  
 Young People and Families**  
 June 2023



**Subject:** ANGLESEY PRIMARY SCHOOL - REPLACEMENT HEATING SYSTEM CAPITAL WORKS – FULL BUSINESS CASE AND CONTRACT AWARD

**Report of:** Sue Harrison, Director of Children and Families

**Relevant Cabinet Member:** Cllr Karen McCarthy- Children, Young People and Families

**Relevant O &S Chair(s):** Cllr Kerry Jenkins – Education, Children and Young People

**Report author:** Zahid Mahmood,  
 Capital Programme Manager,  
 Education Infrastructure,  
 Telephone No: 0121 464 9855  
 Email Address: [zahid.mahmood@birmingham.gov.uk](mailto:zahid.mahmood@birmingham.gov.uk)

Are specific wards affected?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s): Lozells		
Is this a key decision?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, add Forward Plan Reference:		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, state which appendix is exempt, and provide exempt information paragraph number or reason if confidential:		
Exempt Appendix 3. Information relating to the financial or business affairs of any particular person (including the authority holding that information).		

## **1 Executive Summary**

- 1.1 To seek approval for the capital scheme and the award of a contract to replace the heating system at Anglesey Primary School. The capital costs of the scheme will not exceed £864,009.

## **2 Recommendations**

That the Cabinet Member for Children, Young People and Families:

- 2.1 Approve the project costs for the works at Anglesey Primary School at a total project cost of up to £864,009.
- 2.2 Approve the Full Business Case appended to this report.
- 2.3 Approves the award of a contract for the replacement heating system at Anglesey Primary School to Dodd Group Ltd.
- 2.4 Authorises the City Solicitor and Monitoring Officer to execute and complete all necessary documents to give effect to the above recommendations.

## **3 Background**

- 3.1 The Local Authority has a statutory duty to maintain its schools in order to ensure children have a safe and secure teaching environment.
- 3.2 Anglesey Primary School have encountered several problems relating to the site's existing boilers and heating system. The existing boilers are over thirty years old; the heating distribution pipework and the majority of the radiators are the original installation and are over fifty years old. The mechanical plant and pipework have also surpassed their intended lifecycle.
- 3.3 Anglesey Primary School's existing heating system is a one pipe system and does not provide adequate heating throughout the building. The school's existing radiators are a mix of steel panel and cast-iron radiators with little or no thermostatic temperature control.
- 3.4 The school has two existing gas fired boilers sited in the main plant room. One of the boilers is beyond economic repair due to the age of the boiler and the parts being obsolete and the other boiler, although working, is leaking.
- 3.5 The school have experienced multiple leaks with the existing heating distribution pipework and costly repairs have been undertaken to provide heating in the building.
- 3.6 Due to circulation issues much of the heating distribution pipework and radiators in the nursery area of the building do not function and the school have been relying on electrical fan heaters which do not meet the requirements for the school's staff and pupils.
- 3.7 It is proposed that a full replacement of the school's heating system including boilers, flue system, plant, controls, distribution pipework and radiators is

undertaken to meet the school's requirements. This will enable the school to be heated and reduce the cost of repair and maintenance for the heating system.

3.8 Due to the significant amount of asbestos located within the school's main boiler room, the work to replace the boilers, flue system, plant and controls will be coordinated with Birmingham City Laboratories (BCL) to ensure any asbestos identified, can be isolated and removed safely without risk of contamination for pupils, staff, and visitors.

3.9 It is proposed that the project will commence in June 2023 with the construction work to be carried out for a period of 29 weeks. To minimise disruption to the education of the pupils, the majority of the work will be carried out through the week, in the evenings and weekends and utilise all holiday and school shut down periods with a project completion in January 2024.

#### **4 Options Considered and Recommended Proposal**

4.1 Doing nothing would mean the City Council would fail to meet its statutory obligation to maintain the school and provide a safe, secure, and warm environment for the pupils at Anglesey Primary school.

4.2 Further resources could be allocated to repair the one operational boiler which is leaking; however, this is not the most effective use of our limited resources and does not resolve the issue in the long-term.

4.3 The recommended option is to replace the heating system including boilers, pipework, flues, and radiators at Anglesey Primary school. Once replaced the heating system should provide a life span of more than 20+ years and ensure educational continuity for the schools, while minimising potential disruptions caused by building related issues.

#### **5 Consultation**

5.1 The Head Teacher and governors of Anglesey Primary School have been consulted and are fully supportive of the scheme.

5.2 The Ward Members for Lozells have been consulted in relation to the proposals via email and are supportive with the project progressing for decision.

#### **6 Risk Management**

6.1 Risks have been considered as part of the design process. A contingency sum of £50,000 has been allocated to the project. This contingency sum has been included in the overall project costs.

6.2 The risk of cost overruns with the volatile construction environment of increases in materials and labour is being mitigated by a fixed price contract with robust contract management by the Council's technical advisor, Acivico Ltd.

6.3 The risk of asbestos contamination will be managed by Acivico Ltd with support from Birmingham City Laboratories, who will carry out targeted asbestos

surveys and safely remove any asbestos that is present prior to the project work progressing. The investigation and removal of asbestos has been factored into the overall project cost and programme.

## **7 Compliance Issues:**

### **7.1 How are the recommended decisions consistent with the City Council's priorities, plans and strategies?**

7.1.1 These works are to ensure that all pupils are provided with a safe and secure teaching environment. The spending priorities proposed are in accordance with the Schools' Capital Maintenance Programme 2023/24 approved by Cabinet on 16th May 2023, and the Council's Vision and Forward Plan priorities for Children.

### **7.2 Legal Implications**

7.2.1 This report facilitates the discharge of functions contained within section 22 of the School Standards and Framework Act 1998 whereby the local authority has a duty to maintain its schools; this includes expenses relating to premises.

7.2.2 The Local Authority has a statutory duty, by virtue of section 542 of the Education Act 1996 and the School Premises (England) Regulations 2012, to ensure that maintained school buildings are maintained to a standard such that, so far as is reasonably practicable, the health, safety and welfare of pupils are ensured.

7.2.3 Under Section 1 of the Localism Act 2011, the Council has the power to enter into the arrangements set out in this report, which are within the remit and limits of the general power of competence in Sections 2 and 4 of the Localism Act 2011. Any and all legal powers under the Council's Constitution and Procurement and Contract Governance Rules will be upheld when contracting with and or agreeing contracts with third parties.

### **7.3 Financial Implications**

7.3.1 The project costs totalling up to £864,009 will be funded from the School's Condition allocation. This is inclusive of £87,780 Acivico professional fees and £25,165 of EDI capitalisation fees.

7.3.2 Consequential revenue costs arising, including the need for additional staffing and any on-going day-to-day repair and maintenance of the asset, will be the responsibility of Anglesey Primary School and funded from the school's delegated budget.

## **7.4 Procurement Implications (if required)**

- 7.4.1 The procurement implications for the award of a contract for the replacement heating system for Anglesey Primary School following a further competition exercise using Acivico Ltd's Constructing West Midlands 2 Framework Agreement are detailed in Appendix 2 and Exempt Appendix 3.

## **7.5 Public Sector Equality Duty**

- 7.5.1 A Full Equality Analysis EQUA650 was reviewed and updated in March 2023 for Education Infrastructure's Schools' Capital Programme 2023-24. The outcomes from consultation demonstrate that the proposed capital developments support positive outcomes for children, young people, their families, and carers. No negative impact on people with Protected Characteristics was identified. It was concluded that sufficiency of educational places and opportunities for all children and young people contributes to providing positive life chances and supports a positive approach to Safeguarding in Birmingham: actively reducing the number of children and young people out of school helps to mitigate risk to their safety and wellbeing. This scheme falls within the umbrella of the equality analysis EQUA650 and will support a positive outcome.

## **8 Appendices**

- 8.1 Appendix 1 - Anglesey Primary School Full Business Case.  
8.2 Appendix 2 – Procurement Methodology  
8.3 Exempt Appendix 3

## **9 Background Documents**

- 9.1 Schools' Capital Programme - School Condition Allocation 2023-24 report to Cabinet dated 16th May 2023.





## APPENDIX

## FULL BUSINESS CASE (FBC)

## A. GENERAL INFORMATION

## A1. General

<b>Project Title</b> <i>(as per Oracle)</i>	<b>ANGLESEY PRIMARY SCHOOL REPLACEMENT HEATING SYSTEM CAPITAL WORKS – FULL BUSINESS CASE</b>		
<b>Oracle code</b>	B1-AV06H-P101-EC0-LV0013- TZZZZ-JZZZ-JXXX LV0013- 468		
<b>Portfolio /Committee</b>	Children Young People and Families	<b>Directorate</b>	Children and Families
<b>Approved by Project Sponsor</b>	Jaswinder Didiaily	<b>Approved by Finance Business Partner</b>	Clare Sandland

A2. Outline Business Case approval *(Date and approving body)*

Schools Capital programme 2023-24+ Future Years Cabinet Report approved by Cabinet on 16<sup>th</sup> May 2023.

## A3. Project Description

The project involves the replacement of the existing boilers, flue system, plant, controls, heating distribution pipework and radiators which have reached the end of their expected lifecycle and are in serious risk of imminent failure at Anglesey Primary School.

## A4. Scope

The scope of works includes the following:

- Removal of hazardous materials as identified by Birmingham City Laboratories targeted asbestos survey in the school's main boiler plantroom.
- Replacement of existing gas fired boilers, flue system, plant, and controls in the school's main boiler.
- Removal of existing radiators and heating pipework within the school.
- Supply and installation of new zoned heating distribution pipework in the infant and nursery buildings.
- Supply and installation of new radiators and warm air heaters to all associated areas of the infant and nursery school.
- New thermal insulation to all applicable pipework including valve jackets.
- All building work and appropriate fire stopping to all areas of the installation works.

## A5. Scope exclusions

No works outside this scope will be undertaken

## B. STRATEGIC CASE

*This sets out the case for change and the project's fit to the Council Plan objectives*

**B1. Project objectives and outcomes**

*The case for change including the contribution to Council Plan objectives and outcomes*

- A bold prosperous Birmingham.
- A bold inclusive Birmingham.
- A bold safe Birmingham.
- A bold healthy Birmingham.
- A bold green Birmingham.
- Schools Capital Programme.
- Compliance with the requirement of the ‘Birmingham Business Charter for Social Responsibility’.

The project to replace the gas fired boilers, associated pipe work and radiators meets the Anglesey School meets the Corporate Plan objectives by ensuring that children and young people have a suitable and safe space to learn, grow and develop in, so their full potential can be achieved.

**B2. Project Deliverables**

*These are the outputs from the project e.g. a new building with xm2 of internal space, xm of new road, etc*

To ensure educational and operational continuity and the minimisation of long-term disruption to Anglesey Primary School by completing the project to replace gas fired boilers, associated pipe work and radiators.

**B3. Project Benefits**

*These are the social benefits and outcomes from the project, e.g. additional school places or economic benefits.*

<b>Measure</b>	<b>Impact</b>
<i>List at least one measure associated with <b>each</b> of the objectives and outcomes in B1 above</i>	<i>What the estimated impact of the project will be on the measure identified – please quantify where practicable (e.g. for economic and transportation benefits)</i>
To allow continuation of education operations for Anglesey Primary school.	Completing the replacement of the schools heating system will minimise disruption to pupils at Anglesey Primary School in the long-term, and it allows the Council to meet its statutory obligations for school’s conditions.
To provide a safe and warm learning environment for children and young people at Anglesey Primary school.	On completion of the programme of works, children and young people will have a safe and warm environment before, during and after school hours.

**B4. Benefits Realisation Plan**

*Set out here how you will ensure the planned benefits will be delivered*

On completion of the project the planned benefits listed below will be realised:-

- A fully functioning heating system that will keep the building warm, for several years.
- A state-of-the-art heating distribution system, successfully satisfying the Council’s drive towards net carbon zero emissions.
- The new boilers will be more energy efficient and will assist the school in reducing its gas consumption and reduce heating costs.
- Reduced risk of heating failure and school closure.
- Lower the school's ongoing maintenance liabilities and repairs.

<b>B5. Stakeholders</b>
A stakeholder analysis is set out at G4 below.
<b>C. ECONOMIC CASE AND OPTIONS APPRAISAL</b> <i>This sets out the options that have been considered to determine the best value for money in achieving the Council's priorities</i>
<b>C1. Summary of options reviewed at Outline Business Case</b> <i>(including reasons for the preferred option which has been developed to FBC)</i> <i>If options have been further developed since the OBC, provide the updated Price quality matrix and recommended option with reasons.</i>
<ul style="list-style-type: none"> <li>• Doing nothing would mean the City Council would fail to meet its statutory obligation to maintain the school and provide a safe, secure, and warm environment for the pupils at Anglesey Primary School.</li> <li>• Further resources could be allocated to repair corroded and leaking pipe work and further repair the one remaining boiler, however this is not the most effective use of our limited resources and does not resolve the issue in the long-term.</li> <li>• The recommended option is to replace the life expired boilers, pipework, and radiators at Anglesey Primary School.</li> </ul>
<b>C2. Evaluation of key risks and issues</b> <i>The full risks and issues register is included at the end of this FBC</i>
<ul style="list-style-type: none"> <li>• Acivico Ltd has advised of a contingency figure of £50,000 which has been allocated to the project to cover unknown issues that may occur during the construction process, such as addressing inflationary concerns and working around a live school environment.</li> <li>• The risk of cost overruns with the volatile construction environment of increases in materials and labour is being mitigated by a fixed price contract with robust contract management by the Council's technical advisor, Acivico Ltd.</li> <li>• The risk of asbestos contamination will be managed by Acivico Ltd with support from Birmingham City Laboratories, who will carry out targeted asbestos surveys and safely remove any asbestos that is present prior to the project work progressing. The investigation and removal of asbestos has been factored into the overall project cost and programme.</li> <li>• Regular meetings are held to ensure that all parties are informed of progress to ensure any concerns are picked up at the earliest opportunity and resolved to ensure that the programme stays on track.</li> <li>• A project risk register will be maintained.</li> </ul>
<b>C3. Other impacts of the preferred option</b> <i>Describe other significant impacts, both positive and negative</i>
<ul style="list-style-type: none"> <li>• None identified.</li> </ul>
<b>D. COMMERCIAL CASE</b> <i>This considers whether realistic and commercial arrangements for the project can be made</i>
<b>D1. Partnership, Joint venture and accountable body working</b> <i>Describe how the project will be controlled, managed and delivered if using these arrangements</i>
Scheme will be delivered by Project Team as follows: <ul style="list-style-type: none"> <li>• Client for the project is Birmingham City Council.</li> <li>• Project Manager services will be provided and carried out by Acivico.</li> </ul>

## APPENDIX

- The end user will be Anglesey Primary School.
- Regular 2 – 4 weekly meetings will be held with the project team, including client and the end user.
- Programme will be monitored and developed to ensure that required timescales are achieved.
- Scheme costs are to be continually assessed, developed, and monitored.

### **D2. Procurement implications and Contract Strategy:**

*What is the proposed procurement contract strategy and route? Which Framework, or OJEU? This should generally discharge the requirement to approve a Contract Strategy (with a recommendation in the report).*

The procurement route is to carry out a further competition exercise using the Constructing West Midlands 2 Repair and Maintenance Framework Agreement.

### **D3. Staffing and TUPE implications:**

None

Capital Costs & Funding	Financial Year	Totals
	2023/24	
<b>Expenditure</b>		
Construction costs, incl. Surveys, Investigations, & Statutory Fees and contingency	£751,064	£751,064
Acivico Fees	£87,780	£87,780
EDSI Capitalisation	£25,165	£25,166
<b>Total Project Cost Excluding VAT</b>	£864,009	£864,009
<b>Funding sources</b>		
<b>Schools Condition Allocation (SCA)</b>	£864,009	£864,009

## APPENDIX

<b>Totals</b>	<b>£864,009</b>	<b>£864,009</b>

### E2. Evaluation and comment on financial implications:

The current costs for the project are based on tendered cost received on 9<sup>th</sup> January 2023. The overall project budget includes a contingency sum to account for any variations to the contract sum in the time taken to gain approval.

### E3. Approach to optimism bias and provision of contingency

A contingency of £50,000 has been included in the total project cost, if required.

### E4. Taxation

*Describe any tax implications and how they will be managed, including VAT*

N/A

## F. PROJECT MANAGEMENT CASE

*This considers how project delivery plans are robust and realistic*

### F1. Key Project Milestones

*The summary Project Plan and milestones is attached at G1 below*

Cabinet Member Approval of FBC

### Planned Delivery Dates

**June 2023**

Main Construction works

**June 2023**

Practical Completion

**Jan 2024**

### F2. Achievability

*Describe how the project can be delivered given the organisational skills and capacity available*

- Scope of work identified as in the project description.
- Extensive site investigation carried out (including an asbestos survey).
- Project programme and costs have been developed.
- Funding is in place.
- Contractors have considerable previous experience.
- Similar projects have been delivered on budget and to time by the project team.

### F3. Dependencies on other projects or activities

- Landlord approval has been granted for the project.

### F4. Officer support

<b>Project Manager:</b>	Zahid Mahmood 07860906126	Capital Programme Manager, Education Infrastructure <a href="mailto:zahid.mahmood@birmingham.gov.uk">zahid.mahmood@birmingham.gov.uk</a>
<b>Project Accountant:</b>	Jaspal Madahar 07766922478	Finance & Resources Manager <a href="mailto:jaspal.madahar@birmingham.gov.uk">jaspal.madahar@birmingham.gov.uk</a>
<b>Project Sponsor:</b>	Jaswinder Didiaily 07825 117334	Head of Education Infrastructure <a href="mailto:jaswinder.didiaily@birmingham.gov.uk">jaswinder.didiaily@birmingham.gov.uk</a>

### F5. Project Management

*Describe how the project will be managed, including the responsible Project Board and who its members are*

**G. SUPPORTING INFORMATION**

*(Please adapt or replace the formats as appropriate to the project)*

**G1. PROJECT PLAN**

*Detailed Project Plan supporting the key milestones in section F1 above*

- The existing heating system to the school is to be removed including all pipework, radiators and cast-iron pipe coils and replaced in accordance with Brandset Associates specification and drawings.
- The new heating distribution system is to be installed forming two circuits zone 1 and zone 2.
- The installation of the two zones will be undertaken at the same time as the first section of zone two pipework runs through zone 1, with work starting in June 2023.
- The replacement of the boiler plant associated equipment and controls will start in July 2023 when the school closes for summer shut down, the boiler house being sited central within the school grounds and the asbestos removal works cannot be undertaken with the school in occupation.
- The project plan has been produced by Acivico who are operating as the project manager and the chosen contractor prior to the works starting to minimise disruption to the school and to ensure the project is completed within the estimated completion time of 29 weeks.

<b>G2. SUMMARY OF RISKS AND ISSUES REGISTER</b>			
<i>Risks should include Optimism Bias, and risks during the development to FBC</i>			
<i>Grading of severity and likelihood: High – Significant – Medium – Low</i>			
Risk or issue	Mitigation	Risk after mitigation:	
		Severity	Likelihood
Delayed start date due to approval process	Attempts will be made to progress the Cabinet Member report and FBC in time for a start date in June 2023.	High	Medium
Project costs escalate	A fixed price contract programme has been provided by the contractor which will be monitored by the project team.	Low	Medium
Building works fall behind	The project team will closely monitor the scheme on site and liaise with contractor partners to identify action required.	Medium	Medium
BCC faced with increasing revenue costs	Consequential revenue costs arising including additional staffing, utility costs and any on-going day to day repair and maintenance of the asset will be the responsibility of the school. Any increase in revenue costs will be offset by an increase in income through increased pupil numbers provided by the DfE.	Low	Low

<b>G3. EXTERNAL FUNDING AND OTHER FINANCIAL DETAILS</b>
<i>Description of external funding arrangements and conditions, and other financial details supporting the financial implications in section E1 above (if appropriate)</i>
N/A

## G4. STAKEHOLDER ANALYSIS

Stakeholder	Stake in project	Potential impact on project	What does the project expect from stakeholder	Perceived attitudes and/or risks	Stakeholder management strategy	Responsibility
Cabinet Members for ES&C and F&R	Strategic Overview of DGCF expenditure	High	Approval of Cabinet report and expenditure for project.	Strategy not approved	Early Consultation and Regular Briefing on all aspects of Special Provision	BCC / EDI
School's Consultant Partners	Design and Delivery	High	To support delivery and programme management.	Unable to design to budget Unable to deliver to timescales	Close working with other stakeholders Regular feedback	School Leadership Team
School Leadership Team / Governors	Governing Body Agreement and End Users	High	Compliance with GBA Ongoing Revenue costs for R&M once build complete	N/A	Governing Body Agreement signed and regular project meetings	School Leadership Team / Governing Body EDI Project Officer
Pupils	End user	Low	Consultation	Nil	Through school's council	School Leadership Team
Ward Councillors	Knowledge of other developments affecting local communities that may link into project	High	Consultation with community and support for project	Objections from residents	Involve in consultation and planning permission process	EDI Project Officer  Governors/ School Leadership Team



**G5. BENEFITS REGISTER**

*For major projects and programmes over £20m, this sets out in more detail the planned benefits. Benefits should be monetised where it is proportionate and possible to do so, to support the calculation of a BCR and NPSV (please adapt this template as appropriate)*

Measure	Annual value	Start date	Impact
<i>List at least one measure associated with each of the outcomes in B1 above</i>			<i>What the estimated impact of the project will be on the measure identified</i>
<b>(A) Monetised benefits:</b>	£		
<b>(B) Other quantified benefits:</b>			
<b>(C) Non-quantified benefits:</b>	n/a		

<b>Other Attachments</b> <i>provide as appropriate</i>	
•	



**APPENDIX 2****PROCUREMENT METHODOLOGY****1. Procurement Route**

- 1.1 The Council's primary procurement route for capital works of this nature is to use Acivico Ltd's Constructing West Midlands (CWM) 2 Framework Agreement as approved in the Schools' Capital Programme – School Condition Allocation, Basic Need Allocation 2023-24+ Future Years report to Cabinet dated 16<sup>th</sup> May 2023 either by undertaking a further competition exercise (this being the default route) or a direct award, subject to the complexities and timescales of each project in order to ensure that the Council's statutory duties are met.
- 1.2 This framework agreement is compliant with the Public Contracts Regulations 2015 (PCR15) and is suitable for use for a project of this nature therefore no other procurement route was considered.

**2. CWM 2 Repair and Maintenance Framework Agreement**

- 2.1 There are two lots under the framework agreement:
- Lot 1 (Building Fabric)
  - Lot 2 (Mechanical & Electrical)
- 2.2 A further competition was used for this contract to demonstrate value for money to the Council.

**3. Further Competition Assessment**

- 3.1 The protocol for the framework agreement allows an opportunity to be sent to the framework providers on both lots. This has been confirmed by Acivico Ltd, lead authority for the CWM framework agreement and Sandwell Metropolitan Council who provided the procurement and legal advice. Due to the workload capacity of the Lot 2 framework providers at the time, it was decided to offer the opportunity to both Lot 1 and Lot 2 at the same time to try and ensure competition.
- 3.2 The evaluation criteria used was as follows:

## Quality Assessment

<b>QUALITY CRITERIA (40% WEIGHTING)</b>	<b>SUB-WEIGHTING</b>
Project Planning	60%
Project Delivery	30%
Risk Management and Mitigation	10%
<b>TOTAL</b>	<b>100%</b>

#### Price Assessment:

The price assessment accounted for 60% of the overall weighting. Tenderers were requested to tender on a fixed price basis.

#### Combined Quality and Price Assessment

The Weighted Quality Score and Price Score were added to produce an overall combined total score. The tenderer with the highest score representing the most economically advantageous submission is recommended for acceptance.

### 4. Invitation to Tender Stage

4.1 Tender documentation was issued to the following with a return date of 9<sup>th</sup> January 2023:

- Lot 1 - Graham Asset Management Ltd
- Lot 1 - Wates Group
- Lot 2 - Dodd Group (Midland) Ltd
- Lot 2 - Fortem Group

4.2 Questions were raised by tenderers during the tender period and these were addressed by issuing clarifications to all tenderers and requesting these were incorporated into their submission.

4.3 Responses were received from Graham Asset Management Ltd and Dodd Group (Midland) Ltd. Wates Group and Fortem Group declined to tender stating resourcing and workload capacity issues at the time of tendering.

### 5. Evaluation Summary

5.1 The evaluation of tenders was carried out by representatives from Acivico DCFM Ltd.

5.2 Quality Evaluation (40% Weighting)

Company	Dodd Group	Graham FM
Score (out of 100)	84.00	52.00
Weighted Score (Max 40)	40.00	30.77
<b>Rank</b>	1	2

It should be noted that Graham FM failed to submit their quality response with the tender submission. A clarification was issued requesting the documents was uploaded by return to allow for an obvious error. The documents were submitted within the time stated.

The tender from Graham FM scored below the quality threshold of 60% (60 out of 100 marks) and was rejected from the process.

5.3 Price Assessment (60% Weighting)

<b>Company</b>	<b>Dodd Group</b>
Weighted Score (Max 60)	60.00
<b>Rank</b>	<b>1</b>

A clarification was issued to ensure all out of hours working had been accounted for within their submissions. This was confirmed as accounted for. There were no other issues arising from the price evaluation.

#### 5.4 Combined Quality / Price Assessment

<b>COMPANY</b>	<b>Dodd</b>
Quality	40.00
Price	60.00
<b>TOTAL</b>	<b>100.00</b>
<b>Rank</b>	<b>1</b>

#### 5.5 Recommendation

It is recommended that the contract be awarded to Dodd Group (Midland) Ltd on the basis of being the only compliant tender which scored above the quality threshold with a price below the pre-tender estimate.

### 6. Service Delivery Management

#### 6.1 Contract Management

The contract will be managed by Acivico Ltd on behalf of the Council reporting to the Capital Projects Manager, Education Infrastructure.

#### 6.2 Performance Management

Formal contract management measures will be included as a requirement of the contract including key performance indicators around service levels.

