

Gas Boilers, Associated Plant and Water Systems Care & Maintenance

Request for Quotation

BWT/RFQ/1605/0005

20th May 2016

Matt Isherwood

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Brooke Weston Trust

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Great Oakley

Corby

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01536 396366

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Confidentiality Statement

All bidders agree that any information about Brooke Weston Trust, which is exchanged as part of the quotation, negotiation, or performance stages of this contract will be kept confidential by the bidder. This is especially important where the information includes Trust finances, enrolment issues, projects and plans for expansion, new academic areas, or other sensitive information.

Submission Details

Submission Deadlines

All submissions for responding to this request must be submitted on paper and delivered to our office, as stated below, no later than:

2pm, Friday 24th June 2016

Submission Delivery Address

The delivery address to be used for all submissions is:

Contact: **Matt Isherwood**
Job Title: **Director of Estates**
Address: **Brooke Weston Trust**
Proc0005@brookeweston.org

Electronic Submissions

Electronic submissions in response to this Request for Quotation will be accepted as long as they meet the following criteria:

Email: **proc0005@brookeweston.org**

Hard Copy Submissions

Where submission in response to this Request for Quotation are provided as a paper copy, one (1) original and six (6) copies should be supplied.

Submission Requirements

- Please supply your submission in the following format: Microsoft Word 2003-2010, Arial 11pt font, 1-inch page margins, unless documentation exists in another format.
- Must be sent encrypted to protect confidential information.
- Price elements should be on a separate page to Non-Price elements, required for Non-Price evaluation.
- All elements of Scope of Requirements must be addressed in response.
- Submissions are required on or before Submission Deadline.

Submission Questions and Clarifications

- Bidders requiring further clarification or interpretation of the RFQ must submit their request using the question process via email detailed below.

Email: **proc0005@brookeweston.org**

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Gas Boilers, Associated Plant and Water Systems Care & Maintenance

- Bidders may contact the school sites direction for further local clarifications.

School	Position	Name	Address	Phone
Brooke Weston Academy	Premise Manager	Shaun Houghton	Coombe Road, Great Oakley, Corby, NN18 8LA	01536 396366
Corby Business Academy	Premise Manager	Barry Gibb	Academy Way, Gretton Road, Corby, NN17 5EB	01536 303120
Corby Technical School	Premise Manager	Barry Gibb	Cottingham Road, Corby, NN17 1TD	01537 303120
KSA Secondary	Premise Manager	Pete Underwood	Deeble Road, Kettering, NN15 7AA	01536 532700
Thomas Clarkson Academy	Premise Manager	Barry Reed	Corporation Road, Wisbech, Cambs, PE13 2SE	01945 585237
Beanfield Primary	Premise Manager	Frank Burton	Farmstead Avenue, Corby, NN18 0LJ	01536 262000
Gretton Primary	Premise Manager	Barry Gibb	Kirby Road, Gretton, NN17 3DB	01538 303120
KSA Primary	Premise Manager	Pete Underwood	Windmill Avenue, Kettering, NN15 7EA	01536 532700
Oakley Vale Primary	Premise Manager	Brian Hebbard	Cheltenham Road, Corby, NN18 8RH	01536 461199
Peckover Primary	Premise Manager	Barry Reed	Leverington Road, Wisbech, Cambs, PE13 1PJ	01945 584741

Introduction and Executive Summary

The Trust seeks to appoint a supplier to provide its schools and academies, servicing, maintenance and where applicable certification against the regulatory requirements as applicable to Educational Establishments for the described **mechanical engineering systems**.

This tender pack has been developed to provide suppliers with an indicative 'specification for services'. The accompanying specifications for:

- Gas Boilers and Associated Plant
- Water Systems – Servicing Thermostatic mixing valves, and associated plant

The supplied specifications are not exhaustive lists, they captures the fundamental principles of the overall client requirements, however, the client expects suppliers to visit each site and engage with the Premise Managers in order to fully capture the scope of requirements of each site.

Suppliers will appreciate that each site will have facilities, equipment and installations that are particular to each specific site and as such, suppliers are to reflect those particulars in the returned tender itemized for each site but also presented as an overall package for the Trust.

Business Overview & Background

The Brooke Weston Trust specialises in education and has a network of both primary and secondary schools details of which can be found via the following link: <http://www.brookewestontrust.org>

Its Trustees are;

The Garfield Weston Foundation

Founded with the aim of supporting a broad range of activities in the fields of religion, education, the environment, the arts, health (including research) and other areas of general benefit to the community in the UK, the Garfield Weston Foundation makes generous donations to a wide range of organisations each year. The Foundation contributes three sponsor trustees to the Brooke Weston Trust and the current Chairman, George Weston, is the CEO of Associated British Foods.

The de Capell Brooke Family

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Hugh de Capell Brooke was a founding sponsor of Brooke Weston City Technology Trust and was been a consistently strong supporter of the school over many years, taking an active interest in its progress and development both as a CTC and in more recent times as an academy. For many years, Hugh served as Chairman of the Trustees of Brooke Weston. The Brooke Weston Trust now benefits from the strong support of Hugh's son, Alex de Capell Brooke.

Corby Developments Ltd (formerly Bee Bee Developments)

Corby Developments Ltd is a property development company with an international portfolio. A founding sponsor of Corby Business Academy, CDL continue to offer support to the Brooke Weston Trust through their nominated representative, Heneage Stevenson.

The Brooke Weston Trust currently sponsors several schools in Northamptonshire: Brooke Weston Academy, Corby Business Academy, Corby Technical School, Beanfield Primary Academy, Gretton Primary Academy, Oakley Vale and Kettering Science Academy, as well as Thomas Clarkson Academy and Peckover Primary school in Wisbech, Cambridgeshire. Student population is around 7,000, staff population is around 1,000 staff.

Detailed Specifications

Scope of Requirements

Brooke Weston Trust seeks to appoint a single supplier to support the site facilities management teams at the Trust schools and academies:

Brooke Weston Academy
Corby Business Academy
Corby Technical School
Kettering Science Academy
Beanfield Primary School
Gretton Primary School
Kettering Science Academy Primary School (Compass Primary School)
Oakley Vale Primary School
Peckover Primary School*

[*Peckover Primary School, is currently covered by outsourced FM service, please provide indicative quotation. Brooke Weston Trust reserves the right to remove this site from the contract.]

Thomas Clarkson Academy is not included in this RFQ as is currently covered in a PFI contract.

Required Service Provision

Requirements for Mechanical Engineering Systems, to provide care and maintenance services, and where applicable certification for regulatory compliance of

- 1. Gas Boilers and Associated Plant**
- 2. Water Systems – Servicing Thermostatic Mixing Valves, and Associated Plant**

Water Hygiene Testing is not included in this RFQ. Please see separate RFQ for Water Testing Services: BWT/RFQ/1605/0004.

It is important for suppliers to note that the accompanying **Indicative List of Gas Boilers and Associated Plant Testing and Care Schedule** and the general requirements scheduled below are not intended to be exhaustive lists, more a generic specification of 'client requirements'. Suppliers are to submit an 'informed tender return' which captures the particular scope of requirements specific to each site. Suppliers are encouraged to engage with Premise Manager during site surveys in order to reflect the requirements for each site.

Each site is in a different position concerning the condition and servicing, and where applicable regulatory certifications for the systems associated with the **Required Service Provision**. Therefore, suppliers are requested to determine the status of the plant covered and provide detail of necessary servicing and testing regime.

The Trust shall make available to the supplier Mechanical Plant Condition reports held by the sites. Where appropriate, suppliers during preliminary survey visits are to request to review these reports in order to inform their response.

In order to simplify the required response the overall schedule of requirement is divided into:

Commercial plant

Domestic Plant

Statutory Compliance Documentation

Suppliers are required to ensure that prior to appointment full inventories are held for the plant and equipment associated with each sub-schedule.

The general specification set out below is a reference to be read alongside the accompanying specification of requirements for Mechanical Engineering Systems, to provide a guide as typical services that may be required at sites. Specific site requirements will be defined after reviewing full inventories and equipment status.

General Specification

COMMERCIAL PLANT

In all cases where evidence of servicing, testing and certification to the requisite regulations &/or Approved Codes of Practice for Mechanical Plant & Equipment at the sites operated by the Trust as part of this service, the supplier shall ensure that such evidence is provided to the Trust, Premise Manager so as to transparently demonstrate compliance.

BOILER PLANT AND BURNERS - Annually

Check the operation of all boilers to ensure that operational efficiency is maximized.

Take and record the readings of all gauges and thermometers including the boiler flow and return temperatures – adjust controls as necessary.

Check operation and condition of plant generally.

Check security of all oil, water and flue connections to the boiler and repair as necessary.

Check operation of all boiler controls and repair and adjust as necessary.

Check operation of boiler burner and adjust as necessary.

Where applicable change boiler lead lag sequence, to allow equal firing time to each boiler.

Open Boiler Burner assembly and clean and service the burners as necessary.

Generally clean and check the condition of the boilers as necessary.

Check Boilers internally for excessive build-up of Carbon within firing chamber report and clean as necessary.

Check operation of boiler safety valves and other safety controls – repair as necessary.

Check operation of boiler flue system and carry out flue gas analysis – report and carry out repairs and adjustments as necessary.

Remove boiler casings and check boiler sections for leakage or deterioration.

Provide gas safety certification as required by current legislation and any further legislation that may be brought into enactment during the course of this Contract

Obtain water samples from heating installation and replenish chemical treatment as necessary.

Prepare boiler installation for Compliance Audit / insurance / RPA inspection

Check operation of automatic gas safety valve

CONTROLS SYSTEMS - Annually

Operate switches for standby equipment and check that relevant indicator lamps are illuminated.

Clean exterior of equipment.

Check control settings and adjust as necessary.

Check that equipment is not obstructed and is functioning correctly.

Check wiring connections for security.

Fully check the calibration of all equipment and report any deviation from set point.

In discussion with Trust / Premise Manager tune the control systems to maximize performance and energy efficiency of the output plant.

Clean the interiors of all control panels etc.

Check that all fuses are secure and serviceable and replace as necessary. Ensure that replacement fuses are of the correct rating.

Check operation of all indicator lamps and replace defective lamps

CIRCULATION PUMPS - 4 monthly

Check that pumps are operating correctly and that there is no evidence of leaking.

Check the pump motors are not running excessively hot – to be achieved via the most reliable source e.g. thermal imaging technologies.

Check that pumps are delivering water at the correct pressure and flow rate.

Change over run and stand-by pumps to ensure equal wear to each

Adjust belts to belt driven pumps and inspect for evidence of wear. Replace any belts showing sign of deterioration. Note where multiple belts are present the Contractor shall replace belts as a set not individually

Ensure that protective guards are securely and correctly fitted.

Check that all pumps rotate freely paying particular attention to stand-by pumps.

Check anti-vibration mountings and flexible connections for wear and deterioration.

Lubricate motors, bearings etc. in accordance with the manufacturers requirements.

Check electrical connections to the pump and repair as necessary.

PRESSURISATION UNITS & EXPANSION VESSELS - Annually

Check operation of pump and pressure switches.

Check the pump motors are not running excessively hot.

Inspect break tank internally and clean where required.

Inspect system for evidence of leakage and repair as necessary.

Inspect expansion vessel for evidence of leakage.

Check expansion vessel cold fill and adjust as necessary.

Check all control functions associated with pressurisation unit.

Check operation of run/trip lamps. Replace defective lamps as necessary

Check operation of interlocks for correct isolation of system in fault condition.

FEED & EXPANSION TANKS - Annually

Check tanks generally for leakage.

Check that correct water level is being maintained.

Check overflows, cold feeds, open vents, warning and drain pipes for obstruction.

Lift tank covers and check for chemical or natural growth, which may impair the quality of the water.

Check the operation of the delivery valves and repair as necessary.

Check tanks for signs of corrosion.

Check tank supports for signs of deterioration.

HEAT EXCHANGES & CALORIFIERS - Annually

Visually inspect heat exchangers, calorifiers and associated pipework for leaks and deterioration – repair as necessary.

Check and record readings on all gauges and thermometers and adjust controls as necessary.

Remove inspection covers and inspect the internal condition of all heat exchangers and calorifiers, report condition with particular reference to large build-up of lime scale etc., chemically clean or refurbish as necessary in accordance with the requirements of the Supervising Officer.

Prepare all heat exchangers and calorifiers for Compliance Audit / insurance / RPA inspection.

FAN COIL UNITS - 4 Monthly

Check that all units are operating quietly and that all terminals are free from obstruction.

Check or change filter media as appropriate.

Check that control valves are operating correctly and repair/adjust as necessary.

Check and calibrate pneumatic controls as necessary.

Check operation of fan and motors and repair as necessary.
Check condition of coil and clean fins if required.
Check security of mountings.
Check all electrical connections and repair as necessary.

PIPEWORK, VALVES AND FITTINGS - Annually

Fully inspect the complete installation of leaks and deterioration and repair as necessary.
Operate all isolating and control valves, check their condition and repair or replace as necessary.
Check operation of all automatic air vents and air release bottles and vent system

INSULATION - Annually

Visually check the condition of all of the insulation. Repair any defective areas of thermal insulation.

AIR HANDLING PLANT - 4 Monthly

Check unit visually to ensure confirm correct position
Inspect manometers and warning lamps to check for blocked filters
Check filter media and wash or replace as necessary
Check drive belts and adjust as necessary
Check filter medial and replace as necessary.
Clean faces of coils with detergent or compressed air and straighten fins as necessary.
Check operation of all motorized dampers and valves and repair as necessary.
Check condition of all anti-vibration mountings and connections and repair as necessary.
Check drive belts and replace as necessary.
Check fan and motor bearings and replace/repair as necessary.
Check to ensure that unit casing is in good condition and repair as necessary.
Check all electrical connections and repair as necessary.

CENTRIFUGAL & AXIAL FANS - 4 monthly

Check unit for correct operation.

CENTRIFUGAL & AXIAL FANS - Annually

Check condition of all anti-vibration mountings and connections and repair as necessary.
Check drive belts and replace as necessary.
Check fan and motor bearings and replace/repair as necessary.
Check all electrical connections and repair as necessary.

GENERAL CLEANING OF PLANTROOMS - Annually

Remove all redundant materials and clean plantrooms and service spaces as necessary.
Dust, sweep and vacuum all plant and equipment as necessary.

DOMESTIC PLANT

In all cases where evidence of servicing, testing and certification to the requisite regulations &/or Approved Codes of Practice for Mechanical Plant & Equipment at the sites operated by the Trust as part of this service , the supplier shall ensure that such evidence is provided to the Trust, Premise Manager so as to transparently demonstrate compliance.

BOILER PLANT AND BURNERS - Annually

Check the operation of all boilers.
Check operation and condition of plant generally.
To ensure that the performance in operation of the plant is maximized for energy efficiency and output performance.
Check security of all oil, water and flue connections to the boiler and repair as necessary.
Check operation of all boiler controls and repair and adjust as necessary.
Check operation of boiler burner and adjust as necessary.
Generally clean and check the condition of the boilers as necessary.
Check boilers internally for excessive build-up of Carbon within firing chamber report and clean as necessary.

Check operation of boiler safety valve and other safety controls – repair as necessary.
Check operation of boiler flue system and carry out flue gas analysis – report and carry out repairs and adjustments as necessary.
Remove boiler casings and check boiler sections for leakage or deterioration.
Check and report condition of boiler waterways – chemically clean or refurbish as necessary.
Open Boiler Burner assembly and clean and service the burners as necessary.
Prepare boiler installation for Compliance Audit / insurance / RPA inspection.
Provide gas safety certification as required by current legislation (&/or ACoP as applicable) and any further legislation that may be brought into enactment during the course of the appointment.

FEED & EXPANSION TANKS - Annually

Check tanks generally for leakage.
Check that correct water level is being maintained
Check overflows, warning and drain pipes for obstruction.
Lift tank covers and check for chemical or natural growth, which may impair the quality of the water.
Check the operation of the delivery valves as necessary.
Check tanks for signs of corrosion.
Check tank supports for signs of deterioration.

HEAT EXCHANGERS & CALORIFIERS - Annually

Visually inspect heat exchanges, calorifiers and associated pipework for leaks and deterioration – repair as necessary.
Check and record readings on all gauges and thermometers and adjust controls as necessary.

CIRCULATING PUMPS - Annually

Check that pump is operating correctly and that there is no evidence of leaking.
Check that pump motors are not running excessively hot, using appropriate technologies e.g. thermal imaging.
Check that pumps are delivering water at the correct pressure and flow rate.
Change over run and stand-by pumps to ensure equal wear to each.
Ensure that protective guards are securely and correctly fitted.
Check that drive belts, where fitted, are correctly tensioned and are not showing signs of wear.
Check that all pumps rotate freely paying particular attention to stand-by pumps
Check anti-vibration mountings and flexible connections for wear and deterioration.
Lubricate motors, bearings etc. in accordance with the manufacturers requirements.
Check electrical connections to the pump and repair as necessary.

INSULATION - Annually

Visually check the condition of all the insulation throughout the building and report to the Supervising Officer.

CONTROLS INSTALLATION - Annually

Operate switches for standby equipment and check that relevant indicator lamps are illuminated.
Clean exterior of equipment.
Check control settings and adjust as necessary.
Check that equipment is not obstructed and is functioning correctly.
Check wiring connections for security.
Fully check the calibration of all equipment.
Check the interiors of all control panels etc.
Check that all fuses are secure and serviceable and replace as necessary. Ensure that any replacement fuses are of correct rating.

GAS SAFETY CERTIFICATION - Annually

The supplier shall provide Gas Safety Certificates for all of the relevant equipment installed within the sites, both secondary and primary, operated by the Trust subject to this appointment in accordance with the current guidelines &/or legislation/ACoP.
This covers all gas lines up to and including the Science laboratories.

This covers all gas lines up to and including the Food Technology Rooms. The Contactor shall provide Gas Safety Certificates for cookers within these rooms.

This covers all gas lines up to and including the Design Technology 'Heat Treatment' zones. The supplier shall also provide Gas Safety Certificates for applicable appliances within the DT faculties.

All Certificates should be handed to the Buildings Manager &/or Site Supervisor at each site.

On issue of certificates the supplier is required to ensure that all compliance data pertaining to the installations is captured on the Trust Facilities Management Data system.

HIGH LEVEL HEATING (ie Sports Hall) - Annually

Check controls to Heating.

Check and clean vacuum fan assembly as necessary.

Check and adjust systems in accordance with manufacturer's requirements.

STATUTORY COMPLIANCE DOCUMENTATION & ANNUAL REPORT

For AUDIT / INSURANCE / RPA REQUIRMENTS - Annually

Prepare all necessary equipment for the Employers annual Compliance Audit / insurance / RPA checks.

Liaise with the Auditors/Employers Insurers to produce a programme for the necessary inspections and attend the premises as necessary to demonstrate the equipment to the auditors/insurer's satisfaction.

The supplier shall provide a report to the Premise Manager, the content of which shall include details of the following aspects on the plant & equipment.

Details of the site and installations

Extent and limitations of the maintenance and certification service

Characteristics and particulars of the installation

Schedule of Plant & Equipment maintained, serviced, inspected and tested

Schedules of Plant & Equipment details and test/inspection results

Summary of the inspection and tests

Observations and recommendations for actions to be taken

Signed declaration by the contractor

General Requirements

Immediately dangerous conditions should be reported without delay to the relevant Premises Manager and rectified. Other recommendations and observations should be reported using a numbering system to indicate the severity of each observation. This should be in line with recognised standard practice.

The Trust requires that the supplier shall provide detailed invoices for all additional works outside the scope of the appointment. The Trust requires that the supplier shall provide confirmation of the purchase cost of all materials.

The Trust requires that where items/materials/plant of a value greater than £5,000 are required then the supplier shall demonstrate competitive purchasing by providing evidence of at least 3 quotes. This requirement extends to specialist sub-contractors if & when required.

The Trust requires that all costs and percentages on net cost (materials etc.) will remain constant throughout the period of appointment.

Suppliers are required to return tenders using the following headings:

Non-Price:

1. Understanding the Engagement
Where the return will be evaluated to determine the ability of the supplier to deliver a solution meeting the scope of requirements.
2. Personnel
Qualifications, suitability (to include DBS clearance) and capacity demonstration of the supplier to deliver the proposed solution.
3. Recent Experience
Experience of working in the Education estates sector evidenced by case studies/references

4. Method Statement
Description of delivery programme for each site.

Price:

Suppliers are required to provide a 'lump-sum' service price for the servicing, maintenance, inspection and certification of the Plant & Equipment listed in the inventory. It is therefore imperative to avoid potential future disputes that suppliers undertake a comprehensive survey of Plant & Equipment at each site prior to submitting service prices.

Contract Period

The award of contract will be limited to 3 years with a break clause at the end of the end of the first year.

The contract shall be awarded to the successful supplier by the issue of a Purchase Order against the returned quotation. That will include an accompanying number and signatures against the requisite successful supplier quote shall form the basis of the contract.

Brooke Weston Trust terms and conditions are detailed below.

After the first year of support (initial tests/inspections & publication of Reports + Certification), there will be a review of the contract, the 'Break Clause'. This review will be internal to Brooke Weston Trust, will include feedback on the following areas and will be summarized and shared with the supplier.

- Support - to sites with respect to the management of the Mechanical Engineering Building Services and any resulting remedial works.
- Project management – engagement with sites pre/during & post inspection visits.
- Technical performance and any updated requirements.

Warranty

The supplier must demonstrate and hold all applicable certifications and standards pertinent to the scope of this contract.

Service Level Agreement

#	KPI	Timescale
1	Develop a partnership approach between themselves and the individual site Premise Managers. This will be evaluated as part of the internal review.	
2	Develop a full survey and inventory of the installations for each site prior to the commencement of the appointment. a) Discussions held between Trust and the supplier to ensure that any disruption is kept to a minimum b) Where disruption is unavoidable, arrangement of works to take place outside normal school working hours, during school holidays, overnight or at weekends. Notwithstanding the opportunity to access properties during periods of school closure in agreement with each particular site, see note d) below c) Plans in advance works in critical areas, and working in conjunction with IT Departments and other interested parties. There may still be concerns regarding Building Management Systems which will not react well to sudden switch offs. These will require local management. d) Pricing acknowledges that it is not acceptable to charge a premium for working out of hours because this generally will enable the supplier to inspect and test an installation more quickly and efficiently without the need to 'work around' the users of the building. Out-hours working will,	

	in most cases, are readily available during periods of school holidays.	
3	Ensures the compliance of Brooke Weston Trust sites with the regulatory requirements as applicable to Educational establishments (throughout the period of the appointment).	
4	Compliance shall be evidenced by appropriate certification, which shall be available on request for review by the client.	
5	Ensures the compliance of Brooke Weston Trust sites with reference to the regulations pertaining to recording and retention of test and inspection results	
6	Provides to the client data to monitor the performance of the installation over time in order to identify deterioration. This will form diagnostic tool to ensure that maintenance checks are being carried out and to assess their effectiveness.	
7	Provides clear separation between the test/inspection operations of the supplier and those providing the 'Remedial works'. Assurance must be provided by the supplier to the Trust that that any observations and recommendations detailed in any reports are objective and unbiased. On request by the Trust this will be open to independent review at the cost of the supplier	
8	All invoices for additional works and materials shall be approved by the Trust prior to payment. The invoices for additional works and materials will, subject to approval are paid by the Trust at the end of the month following the date of the Invoice.	
9	The charge for the cost of any travelling to the site shall be included within the annual charge or additional hourly labour rates.	
10	Any customer service support must be UK based.	

New Information

The supplier must provide Brooke Weston Trust notification of any new regulations relating to this RFQ within the contract period.

Schedule of Activity

Activity	Start Date	Completion Date
Brooke Weston Trust Issue Request for Quote	20/05/2016	20/05/2016
Preliminary Bidder Site Visits & Data Gathering	23/05/2016	15/06/2016
Bidder Submission of Quotation/Proposal	24/06/2016 by 2pm	24/06/2016 by 2pm
Brooke Weston Trust Evaluation & Pre Approval	27/06/2016	29/06/2016
Brooke Weston Trust Delegated Authority Approval	30/06/2016	15/07/2016
Brooke Weston Trust Communicate Outcome to Bidders and Award Contract	22/07/2016	22/07/2016
Brooke Weston Trust Final Contract Approval	25/07/2016	05/08/2016
Service Supplies Works Commence	29/08/2016	

Out of Scope

Equipment on sites utilising different energy source is not in scope, example: Biomass at OVPS and Ground Source Heat Pump at KSA.

Water Hygiene Testing is not included in this RFQ. Please see separate RFQ for Water Testing Services: BWT/RFQ/1605/0004.

Assumptions & Constraints

Assumptions:

- a. That the supplier will ensure that the Brooke Weston Trust is compliant with legislation of specific relevance to gas systems & associated plant and water systems & associated plant; the Health & Safety at Work Act 1974, the Gas Safety (Installation & Use) Regulations 1998 and any revisions that may have come into action to date.
- b. The supplier notifies and updates practice in agreement with the Trust of any regulatory changes as applicable to Educational establishments throughout the period of the appointment.
- c. That the supplier provides clear separation between the staff conducting the test/inspection operations and those staff providing emergency 'Remedial works' in order that assurance is provided that any observations and recommendations detailed in the System(s) Installation Condition Report are objective and unbiased.
- d. With reference to 'constraint b', the supplier will ensure that the Trust is not charged a premium for the 'out of hours' requirements.
- e. That the supplier is able upon request to evidence that the labour charges (£/Hr) and materials used in order to carryout remedial works are of typical market value and demonstrate good value for money to the Trust.

Constraints:

- a. That the routine operations of the educational establishments under this agreement are not disrupted, and that should disruption be envisaged then discussions are held between the Trust and the supplier with sufficient notice to ensure that any disruption is managed and be kept to a minimum.
- b. In delivery of (a) the supplier arranges for inspection and testing to take place outside of normal school operating/working hours, either overnight or at weekends, notwithstanding the opportunity to access the properties during periods of school closure in agreement with each particular site.

General Quotation Requirements

An authorised agent of the Bidder must sign quotations and all information requested must be submitted by the established deadline. All bidders must provide the following in their response to this RFQ:

- Complete bidder information, describing the size and scope of operations, corporate structure, names, titles and roles of people who would be working directly with Brooke Weston Trust if your company were to be awarded the contract and years of experience with your company.
- Clearly indicate if any of the roles listed in this RFQ will be subcontracted to another supplier. All valid DBS clearance certificates to be supplied by the bidder including those of any subcontractors. (If work is undertaken during school opening hours) DBS certificates must be made available to BWT prior to any works carried out within the schools.
- Outline a plan to set up and maintain a successful delivery programme.
- A copy of your organisations latest Annual Report, or Audited Balance Sheet including Profit and Loss statement. If available via website, a link to this information to made available. References to be included in bid both financial and previous or ongoing customer references.
- Please provide details of your top three customer accounts and additionally details of any other key Trust or educational customers. If the latter please can you, confirm if we could speak to the pertinent representative in the form of references.
- Other pertinent information the bidder feels would assist in the evaluation of the bidder's capability.

Tax and Invoice Requirements

Brooke Weston Trust holds “Charitable Non-Business Activity” status & as such is VAT exempt. Payment terms to the company are net 30 days from the date of invoice.

For this service, the Trust wishes to operate an interim payment schedule, based on a cash-flow forecast, which must be included within the returned quotation

Selection Criteria and Contract Award

Bid Evaluation

The contract will be awarded to the supplier who has submitted a bid that most closely meets the scope of the project and is value for money. The returned bids will be evaluated using a weighted score card split as follows:

Price	40%
Non Price	60%

Price Evaluation

Suppliers are required to provide a ‘lump-sum’ service price for the servicing, maintenance, inspection and certification of the Plant & Equipment listed in the inventory, for each Site. It is therefore imperative to avoid potential future disputes that suppliers undertake a comprehensive survey of Plant & Equipment at each site prior to submitting service prices.

Site	Annual Service Charge	Payable Period
Brooke Weston Academy		
Corby Business Academy		
Corby Technical School		
Kettering Science Academy Secondary		
Beanfield Primary School		
Gretton Primary School		
Kettering Science Academy Primary		
Oakley Vale Primary School		
Peckover Primary School *		

Suppliers are requested to provide labour charges per hour for any remedial works &/or other works that may be required that may be requested that are outside the scope of the appointment.

Suppliers are required to complete the following table to clarify pricing structure. Please include any additional items in an additional table within the return.

Time	Engineer Type	Call Out	Hourly Rate
Monday – Saturday 8am – 5pm		Standard Site Attendance to include up to 1 hour labour	
Monday – Saturday 8am – 5pm	General Engineer	Thereafter 1 st hour	
Monday – Saturday 8am – 5pm	Controls Engineer	Thereafter 1 st hour	
Monday – Saturday 8am – 5pm	Combustion Engineer	Thereafter 1 st hour	
Monday – Saturday After 5pm		Standard Site Attendance to include up to 1 hour labour	

Monday – Saturday After 5pm	General Engineer	Thereafter 1 st hour	
Monday – Saturday After 5pm	Controls Engineer	Thereafter 1 st hour	
Monday – Saturday After 5pm	Combustion Engineer	Thereafter 1 st hour	
Sunday & Bank Holidays	General Engineer		
Sunday & Bank Holidays	Controls Engineer		
Sunday & Bank Holidays	Combustion Engineer		

Item	Mark Up % on Net Cost
Materials	
Plant	
Specialist Sub-Contractors	
Hire of Equipment	

Emergency Call-out:

In the event of an emergency call-out the Trust requires that the supplier shall include costs incurred by the supplier within the annual service charge. Notwithstanding material/equipment etc costs that are outside the scope of service. These shall be chargeable at the published and agreed rates.

Non Price Evaluation

Element	Measurement	Weighting
Understanding of Engagement	Ability to deliver proposed solution meeting the scope of requirements & capacity for ongoing support	20%
Personnel	Suitability, Qualifications (incl DBS clearance) and capacity demonstration	10%
Recent Experience	Experience in market and working within Education, case studies, reference	15%
Method Statement	Process and Schedule of delivery for each site	15%

Contract Award

- The contract shall be awarded to successful supplier by the issue of a Purchase Order Number against the returned quotation.
- The successful supplier quotation shall form the basis of the contract.
- Terms and Conditions Brooke Weston Trust will use are detailed in this RFQ
- The contract term is stated in Detailed Specifications Contract Period in this RFQ.
- Implementation schedule is documented in Schedule of Activity in this RFQ.

Disclaimers

- Late responses will be deleted prior to opening.
- Quotations must address all terms of this RFQ.
- Terms and conditions may be incorporated into the final contract.
- In the event that there is a discrepancy between the contract and the RFQ, the RFQ will prevail.
- Brooke Weston Trust (BWT) reserves the right to accept or reject any or all quotations.
- It is the Trusts’ intention to award this contract to the supplier who provides the best overall value to the Trust.
- That value will be determined by an evaluation of the price and non-price elements of the returned supplier information.

- Brooke Weston Trust is not obligated to award this contract to lowest bidder.
- Brooke Weston Trust reserves the right to award a contract without further discussions. Therefore, the original submissions must be as complete as possible in all respects.
- Whether a quotation is responsive to this RFQ shall be determined exclusively by and under the sole discretion of Brooke Weston Trust.
- Brooke Weston Trust reserves the right to waive any informality in or reject any or all quotations and accept quotations deemed most favourable to the interest of Brooke Weston Trust after all quotations have been examined and reviewed.
- Any interpretations, correction, or changes in RFQ made in any manner, other than that described here, will not be binding on Brooke Weston Trust and should not be relied on in the RFQ process.
- Brooke Weston Trust may choose to terminate this RFQ at any time for any reason.
- Brooke Weston Trust makes no guarantees as to the actual service purchased, nor will Brooke Weston Trust accept any penalties from the supplier regarding the service purchased

Terms and Conditions

Communities and Local Government - Short Form Conditions of Contract These conditions shall not apply where the supply of goods or services is subject to the terms of a framework contract between the Contractor and BROOKE WESTON TRUST. BROOKE WESTON TRUST - Short Form Conditions of Contract - Version 1.0 January 2011

1. Definitions - In these conditions:

“Contract” means the agreement between BROOKE WESTON TRUST and the Contractor comprising BROOKE WESTON TRUST’s request for quotation (&/or request for quotation), any specification, the Contractor’s quotation (&/or quotation), these Short Form Conditions of Contract, the Purchase Order, and any documents referred to therein.

“Contractor” means the individual, firm or company with whom BROOKE WESTON TRUST enters into the Contract (including where the context requires any of the Contractor’s sub-contractors) as identified in the Purchase Order.

“BWT” means the Brooke Weston Trust.

“Goods” means anything (other than Services) supplied or to be supplied to BROOKE WESTON TRUST under the Contract.

“Purchase Order” means the purchase order issued by BROOKE WESTON TRUST to the Contractor for the supply of Goods and/or the provision of Services.

(v) “Services” means all the services that the Contractor is required to carry out under the Contract.

2. Conditions for the supply of Goods - Contractor’s duties

(i) The Contractor shall supply the Goods specified in the Contract. Goods may be returned at the Contractor’s expense if they do not correspond with the Contract.

(ii) All Goods shall be delivered, carriage paid, at the place specified and only between 9.00 am and 4.00 pm Mondays to Fridays, unless otherwise agreed by BROOKE WESTON TRUST. A delivery note must accompany the Goods and must specify the quotation reference and the type of Goods being delivered and must also include BROOKE WESTON TRUST’s reference number and the Purchase Order number.

(iii) The cost of packaging will be deemed to be included in the cost of the Goods. If the Contractor requires packaging to be returned, it will be returned at the Contractor’s expense.

3. Conditions for the supply of Services - Contractor’s duties

(i) The Contractor shall properly perform the Services specified in the Contract with the standard of skill, care and diligence which a competent and suitably qualified person performing such services could reasonably be expected to exercise and in accordance with all relevant statutory requirements and industry best practice.

4. Environmental Requirements

(i) In providing the Goods or Services the Contractor shall comply with BROOKE WESTON TRUST’s environmental policy, which is to conserve energy, water and other resources, reduce waste and phase out the use of ozone depleting substances and minimise the release of greenhouse gases, volatile organic compounds and other substances damaging to health and the environment.

(ii) All written outputs produced in connection with the Contract shall (unless otherwise specified) be produced on recycled paper containing at least 80% post-consumer waste and used on both sides where appropriate.

(iii) Maximum use must be made of recycled materials in the manufacture of crates, pallets, boxes, cartons, cushioning and other forms of packaging. Packaging must be capable of recovery for reuse or recycling.

5. Health, safety and security

(i) The Contractor shall ensure that all of the Contractor's personnel who have access to or are employed on BROOKE WESTON TRUST's premises comply with BROOKE WESTON TRUST's health, safety and security procedures and instructions and complete any additional security clearance procedures required by BROOKE WESTON TRUST before working at BROOKE WESTON TRUST's premises.

6. Invoices and Payment

(i) The Contractor shall submit an invoice within 30 days of meeting any milestone set out in the request for quotation/& or RFQ to the satisfaction of BROOKE WESTON TRUST or otherwise within 30 days of supplying the Goods or Services to the satisfaction of BROOKE WESTON TRUST. The invoice shall show the amount of VAT payable and bear the Purchase Order number. Save where an invoice is disputed, BROOKE WESTON TRUST shall pay the Contractor within 30 days of receipt of an invoice.

7. Corrupt Gifts and Payments of Commission

(i) In accordance with the Bribery Act 2010, the Contractor shall not receive or agree to receive from any person, or offer or agree to give to, or procure on behalf of any person in the employment of Brooke Weston Trust, any gift or consideration of any kind as an inducement or reward for doing or not doing anything, or for showing favour or disfavour to any person in connection with the Contract.

8. Official Secrets Acts

(i) If applicable to the Contract, the Contractor shall take all reasonable steps to ensure that all persons employed by him or by any sub-contractor in connection with the Contract are aware of the Official Secrets Acts 1911 to 1989, and understand that these Acts apply to them during and after performance of any work under or in connection with the Contract.

9. Disclosure of Information

(i) To enable compliance with the Freedom of Information Act 2000 and the Environmental Information Regulations, BROOKE WESTON TRUST reserves the right to disclose information about this Contract pursuant to a valid request for information.

(ii) The Contractor hereby gives consent for BROOKE WESTON TRUST to publish the Contract in its entirety to the general public.

(iii) The Contractor shall not disclose any information relating to the Contract or BROOKE WESTON TRUST's activities without the prior written consent of BROOKE WESTON TRUST, which shall not be unreasonably withheld. Such consent shall not be required where the information is already in the public domain, is in the possession of the Contractor without restriction as to its disclosure, or is received from a third party who lawfully acquired it and is under no obligation restricting its disclosure.

10. Discrimination

(i) The Contractor shall not discriminate directly or indirectly or by way of victimisation or harassment against any person contrary to legislation relating to any discrimination (whether in race, gender, religion, disability, sexual orientation, age or otherwise) as amended from time to time, including but not limited to the Race Relations Act 1976, the Sex Discrimination Acts 1975 and 1986, the Disability Discrimination Acts 1995 and 2005, the Employment Equality (Sexual Orientation) Regulations 2003, the Employment Equality (Religion or Belief) Regulations 2003 and the Equalities Act 2010.

11. Sub-contracting and assignment

(i) The Contractor shall not sub-contract or transfer, assign, novate, charge, or otherwise dispose of the Contract or any part of it without the prior written consent of BROOKE WESTON TRUST. Where the Contractor enters into a contract with a supplier or sub-contractor for the purpose of performing the Contract or any part of it, it shall cause a term to be included in such contract which requires payment to be made by the Contractor to the supplier or sub-contractor within a period not exceeding 30 days from receipt of a valid invoice as defined by the contract requirements.

12. Intellectual Property Rights

(i) Subject to any prior rights of BROOKE WESTON TRUST, and to the rights of third parties arising otherwise than under the Contract, such intellectual property rights as are derived from or arise as a result of the performance of the Contract by the Contractor shall vest in the Contractor. The Contractor hereby grants a perpetual, irrevocable, worldwide, royalty-free licence to BROOKE WESTON TRUST (and any person authorised by them) to use, supply, reproduce, publish, modify, adapt, enhance or otherwise deal with any materials in which such intellectual property rights exist.

13. Termination

(i) If the Contractor fails to fulfil its obligations under the Contract, BROOKE WESTON TRUST may terminate the Contract forthwith by written notice and, in accordance with condition 16, may recover from the Contractor any reasonable costs necessarily and properly incurred by BROOKE WESTON TRUST as a consequence of termination.

14. Break

(i) Without prejudice to condition 13, BROOKE WESTON TRUST shall at any time have the right to terminate the Contract or reduce the quantity of Goods or Services to be provided by the Contractor in each case by giving to the Contractor one month's written notice. During the period of notice BROOKE WESTON TRUST may direct the Contractor to perform all or any of the work under the Contract. Where BROOKE WESTON TRUST has invoked either of these rights, the Contractor may claim reasonable costs necessarily and properly incurred by him as a result of the termination or reduction, excluding loss of profit and consequential losses, provided that the claim shall not exceed the total cost of the Contract.

(ii) Termination or reduction under this provision shall not affect the rights of the parties to the Contract that may have accrued up to the date of termination.

15. Loss or Damage

(i) The Contractor shall, without delay and at the Contractor's own expense, reinstate, replace or make good to the satisfaction of BROOKE WESTON TRUST, or if BROOKE WESTON TRUST agrees, compensate BROOKE WESTON TRUST, for any loss or damage connected with the performance of the Contract, except to the extent that such loss or damage is caused by the neglect or default of BROOKE WESTON TRUST. "Loss or damage" includes but is not limited to: loss or damage to property; personal injury; sickness or death; and loss of profits or loss of use suffered as a result of any loss or damage.

16. Recovery of Sums from Contractor

(i) Whenever under the Contract any sum or sums of money shall be recoverable from or payable by the Contractor to BROOKE WESTON TRUST, that amount may be deducted from any sum then due, or which at any later time may become due, to the Contractor under the Contract or under any other contract with BROOKE WESTON TRUST.

17. Compliance Audit / insurance / RPA

(i) The Contractor shall effect and maintain an adequate level of Compliance Audit / insurance / RPA cover in respect of all risks that may be incurred by him in the performance of this Contract.

18. Notices

(i) A notice may be served: by delivery to the Contractor; by sending it by email to him; or by ordinary first class post to the Contractor's last known place of business or registered office. A notice shall be deemed served at the time of delivery, after four hours for an email, or on the second working day after posting.

19. Law and Jurisdiction

(i) The Contract shall be governed by and interpreted in accordance with the law of England and Wales. The parties hereby submit to the exclusive jurisdiction of the English Courts.

20. Dispute Resolution

(i) In the event of dispute, the parties shall negotiate in good faith to reach a solution. If they do not reach a solution within one month BROOKE WESTON TRUST may refer the dispute to mediation. During the dispute the Contractor shall at BROOKE WESTON TRUST's discretion continue to perform the Contract with all due diligence.

21. Variations to the Contract

(i) No variation to the Contract will be effective until it has been recorded in writing and signed by BROOKE WESTON TRUST and the Contractor.