



Defining Sustainable Procurement for the Public Sector

EXESEED FRAMEWORK USER MANUAL



The UK's Leading Passivhaus Based Contractors' Framework

FRAMEWORK MEMBERS

The Framework has been procured through a fully compliant OJEU process. OJEU Notice 15968876_3 published on 25 November 2015. Contract Award notice 2016/S 106-188296. published on the 06 June 2016. Through this process eleven contractors have been appointed to three different valued Lots.

Lot A – Projects Valued between £50,000 to £1,499,999	Lot B – Projects Valued between £1,500,000 to £9,999,999	Lot C – Projects Valued Above £10,000,000
C G Fry & Son Ltd	Bouygues UK	BAM Construction UK
ENELCO	C G Fry & Son Ltd	Bouygues UK
Harris Bros & Collard Ltd	ENELCO	Interserve Construction Plc
Midas Group	Halsall Construction	Sir Robert McAlpine
Pemberton Homes	Harris Bros & Collard Ltd	Willmott Dixon
	Interserve Construction Plc	
	Midas Group	
	Pemberton Homes	



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INTRODUCTION

The main aim of the Exeter Sustainable Energy Efficient Developments (EXEseed) Framework is to enhance the sustainable and commercial value of Local Authority construction procurement. The Framework has been established for Exeter City Council to deliver passivhaus buildings that are both healthy and climate ready. The EXEseed Framework provides a delivery platform for all public sector bodies who are looking to deliver cost-effective sustainable energy efficient developments.

The Framework provides access to a carefully selected list of Contractors who have proven their competency in collaboration, culture, value and quality. There will be further benefit to the client locality through local employment, local spend and other client driven community initiatives. Access to the Framework Members is quick and, providing cost and time efficiencies to those bodies who wish to access it.

THE FRAMEWORK

The Framework can be used to develop single and multiple sites within the client's ownership for a variety of uses including residential housing, leisure centres, education facilities, residential care homes, civic buildings, office and retail.

Using the Framework means:

- Pre-qualified Contractors selected for three different valued 'lots.'
- Pre-determined overhead and profit marks ups
- Risk reduction to Client
- The supply chain will be effectively managed
- Commercial and time savings to Client
- Enhanced opportunities for local Community
- Sustainable building that deliver cost and environmental benefits
- Improving the quality of life for occupants

The Framework can be accessed by all public bodies and charitable organisations within the boundary of the United Kingdom, as shown on page 10.

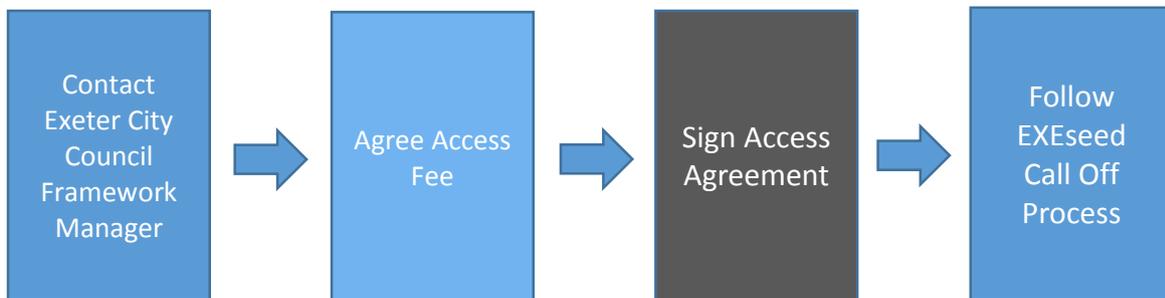
FLEXIBILITY

Clients will approach the EXEseed Framework Manager to discuss requirements and potential to use the Framework. Clients will need to be clear on the anticipated value of construction project to enable discussion and agreement around Access Fee. Once finalised, the Client will execute the access agreement and the call off process can commence. Please refer to the diagram below which describes the journey of procuring off the project.

Clients have the opportunity to run a mini-competition or perform a direct call off. Please note, a mini-competition is mandatory for Lot C value projects.

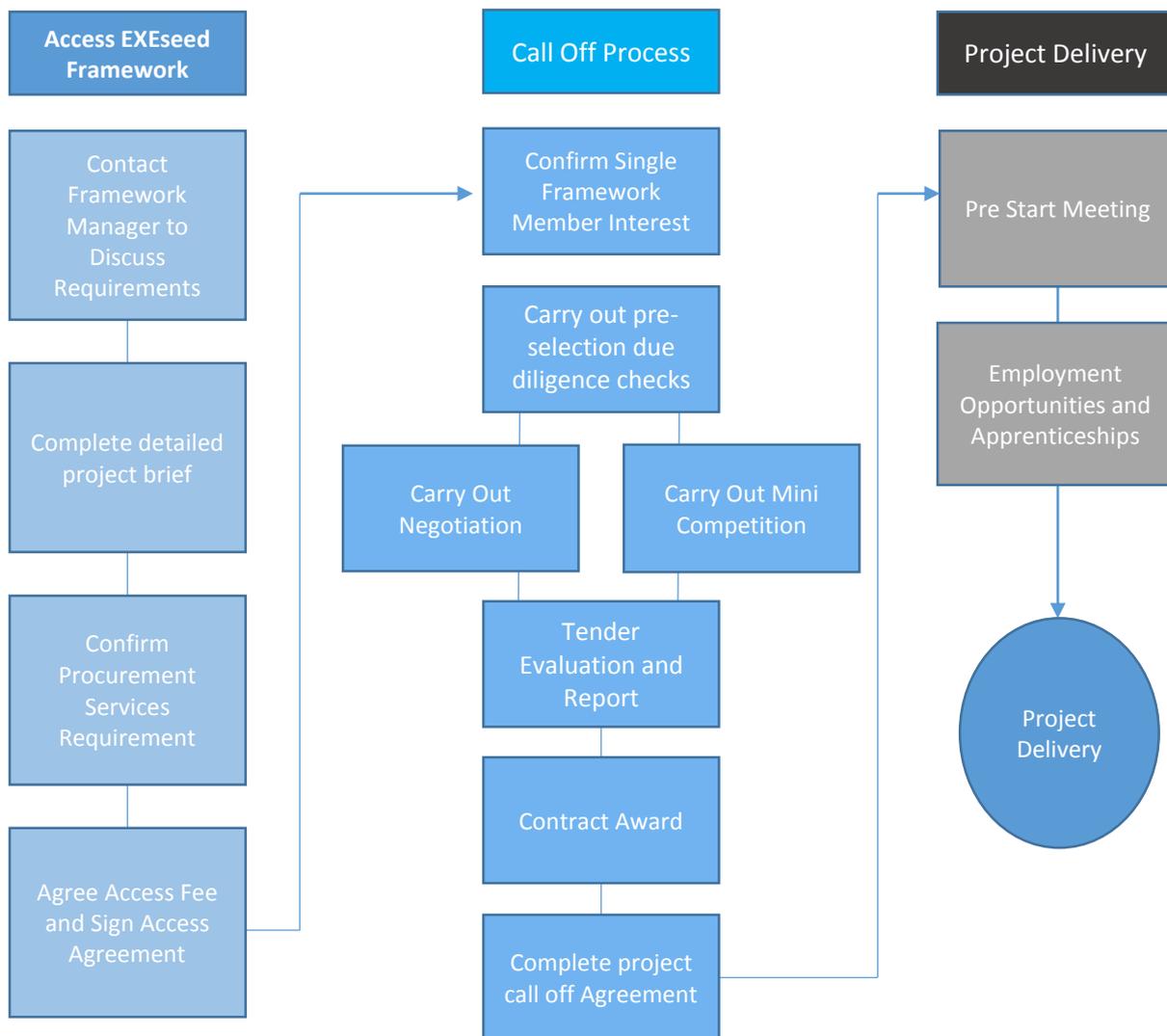
FRAMEWORK ACCESS PROCESS

Key Stages and Gateways



CALL OFF PROCESS

A call off contract will be awarded using either a mini competition or a direct call off (through negotiation) – see below. The call off process will commence with an Expression of Interest.



Framework Members invited to participate in a mini competition or negotiate a direct call off may still be required to satisfy both the Client with regard to:

- Technical capability and capacity to satisfactorily deliver the project (this Assessment will take account of the Framework Member's recent Framework performance)
- Delivery of the project within tendered rates
- Robust financial standing
- Acceptable Health & Safety accreditation

Clients accessing the Framework retain the right to require Framework Members to provide Parent Company Guarantees and/or Performance Bonds.

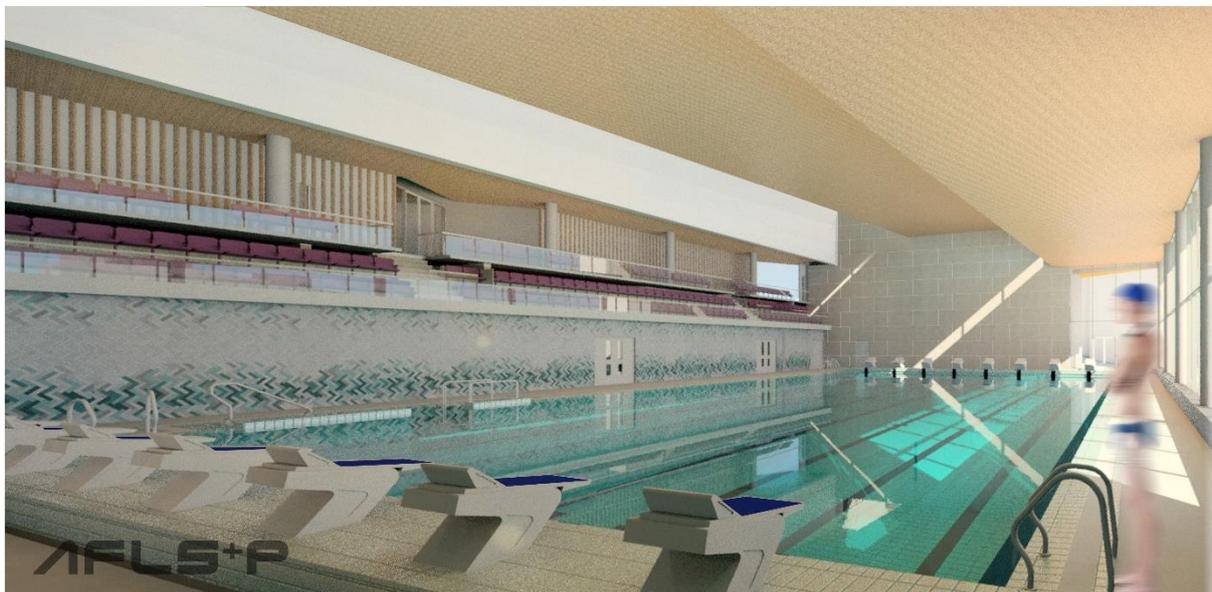
The call off process will require Framework Members to return a tender based on price and quality. The original Framework Invitation to Tender (ITT) evaluation criteria will be used as the basis for mini competitions, albeit the criteria may be varied by clients to suit the nature and requirements of their individual call off project.

For example, where qualitative factors have less overall importance, the financial offer may be weighted higher, and vice versa.

The mini competition will use qualitative sub-criteria similar to that used for the original Framework award (see 'Due diligence' section on page 8 for more information), but it will be applied pro rata according to the selected price: quality split. The key commercial parameters submitted by Framework Members in response to the original Framework ITT will have to be met as a minimum in a mini competition financial offer (see 'Due diligence' section on page 8 for more information).

Framework Members may at that stage offer a more advantageous commercial position for the client, but may not offer a less advantageous position.

Other financial criteria can be developed by the client as part of the financial aspect of a mini competition.



TENDERING

Exeter City Council will use a dedicated procurement procedure to manage all mini competitions. All opportunities offered to Framework Members from clients will be offered using this system. Framework Members cannot progress mini competition opportunities in relation to the EXEseed Framework through any other system.

Once selected following mini competition, the successful Framework Member will be appointed by the Client through a separate contract comprising (but not limited to) the following documents;

- JCT Design & Build Form of Contract
- JCT Minor Works Form of Contract
- JCT Intermediate Form of Contract
- JCT Standard Form of Building Contract with Quantities
- JCT Standard Form of Building Contract without Quantities
- Deed of Novation
- Contractor Collateral Warranty
- Sub Contract Collateral Warranty
- Professional Consultant Collateral Warranty
- JCT PCSA
- Parent Company Guarantee
- Performance Bond

ACCESS FEE

Framework Members will pay the access fee and will be notified by the Framework Manager of the applicable fee at the time they are invited to tender. The Framework access fee is calculated based on a case by case basis, but has proven exceptional value for money when compared to the cost of setting up such a Framework.

FRAMEWORK MANAGEMENT

The Framework will be managed direct by Exeter City Council. Contact details are as follows:

EXEseed Framework Manager
Exeter City Council
Civic Centre
Paris Street
EXETER
EX1 1JN
E: housing.development@exeter.gov.uk
T: 01392 26 5685
W: www.exeter.gov.uk/exeseed

Framework Manager duties

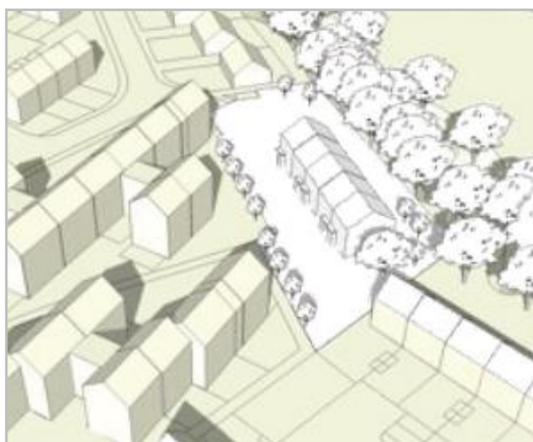
The Framework Manager duties include:

- Provide procurement advice relating to the project
- Carry out employment and skills plan compilation/ coordination/monitoring
- Provide Client briefings on Framework procedures in relation to the project call off
- Provide post-project call off advice regarding Framework operation/ management
- Carry out Framework (not project) performance measurement and management
- Provide standard tender and contract management documents
- Collate and submit responses to tender clarification requests (if required)
- Conclude any evaluation report and recommendations based on tender submissions

Please note: Exeter City Council will have no liability for works procured by organisations using the Framework

Value and duration of the Framework

The Framework will run for a period of 4 years ending on **06 June 2020**. It is acknowledged and accepted that many of the projects procured through the Framework will have build-out durations that exceed the 4 year lifetime of the Framework.



DUE DILIGENCE

THE PROCUREMENT PROCESS

The procurement process The Framework has been procured through a fully compliant OJEU process. OJEU Notice 15968876_3 published on 25 November 2015. Contract award notice 2016/S 106-188296. published on the 06 June 2016.

The first stage of the process was the issue of a pass/fail Pre-Qualification Questionnaire (PQQ). The PQQ was used to establish the experience and capabilities of the prospective Framework Members assessed against the following criteria;

- Grounds for Mandatory Exclusion
- Grounds for Discretionary Exclusion
- Economic and Financial Standing
- Technical and Professional Ability

The second stage of the process was an Invitation To Tender for those Contractors who achieved a 'pass' at PQQ stage. The ITT format was weighted 70/30 in terms of cost and quality, summarised as follows;

Section - Cost	Weighting
Overheads	15%
Profit	15%
Total Weighting for Cost	30%

Section - Quality	Weighting
Method Statement 1 - Achieving the Environmental Factors through supply chain management and construction activity works on site.	14%
Method Statement 2 - Culture	21%
Method Statement 3 - Collaboration	3.5%
Method Statement 4 - Equality, Opportunity and Training	3.5%
Method Statement 5 - Health and Safety	3.5%
Method Statement 6 - Delivery Model	7%
Method Statement 7 - Risk Management	3.5%
Method Statement 8 - Cost Management	14%
Total Weighting for Quality	70%

USE OF THE FRAMEWORK BY OTHER RELEVANT BODIES

Local Authority Councils: County, Unitary, District, Borough and Metropolitan Councils	www.direct.gov.uk (Parish and Community Councils are also permissible users)	
Central Government departments and their agencies	www.direct.gov.uk	
Educational establishments: Nursery School, Primary School, Middle or High School, Secondary School, Academy, Special School, Pupil Referral Unit (PRU), Further Education, College, University.	www.schoolswebdirectory.co.uk www.ucas.com www.ukschoolsdirectory.net www.edubase.gov.uk	
Police, Fire and Rescue, Maritime and Coastguard Agency emergency services	www.police-information.co.uk www.psnl.police.uk www.scottish.police.uk	www.nifrs.org www.mcga.gov.uk www.fireservice.co.uk
NHS bodies, the HSC (Northern Ireland) and Ambulance Services	www.nhs.uk www.engage.hscni.net www.hscni.net	
NHS bodies, Scotland and Wales NHS and Ambulance Service	www.show.scot.nhs.uk www.scottishambulance.com www.wales.nhs.uk	
Registered charities	www.charity-commission.gov.uk www.oscr.org.ukw www.dsdni.gov.uk	
Registered social landlords: Government-funded, not-for-profit organisations that provide affordable housing. They include housing associations, trust and co-operatives.	www.idea.gov.uk	



CONTACT

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