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| Project Workstage: | RIBA 3+/Employers Requirements (ER's) |
| Report Author: | Darren Aspinall |
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GROVE PRIMARY SCHOOL EXPANSION PROJECT:

PQQ/INVITATION TO TENDER (ITT) DOCUMENT

Two stage Design & Build Procurement

Document & Change Control:

| Version | Changes since previous version | Issued by |
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| 30/09/2025 | PQQ/ITT Issue | Darren Aspinall |

PQQ/INVITATION TO TENDER (ITT) DOCUMENT



1. Introduction

The Oxford Diocesan Schools Trust (ODST) Trust is seeking to invite suitable contractors to participate in a 2 stage Design & Build Procurement tender process for the expansion of Grove Primary School, North Drive, Grove, Wantage OX12 7PW. The project is being delivered by ODST in conjunction with Oxfordshire County Council.

The project involves a new stand alone primary school building and associated external works and landscaping as indicated on the ITT tender drawings. The project build cost for the new building and associated landscape is estimated at circa £6 million exclusive of VAT. The current design has been developed to RIBA 3 workstage and a planning application is currently submitted for approval to South & Vale District Council. A positive pre-planning advice application was received in August 2025 and we do not anticipate any significant issues in obtaining planning consent.

It is proposed to novate the Architect, Principal Designer CDM (CDM PD), Building Regulations Principal Designer (BR PD), Structural & Civil consultant and Landscape consultant to the contractor team to complete the design and fee proposals will be provided to the shortlisted bidders for inclusion in the stage 2 tender bids. The QS and M&E Consultant will remain client post contract and for the duration of the construction stage. Bidders are not required to provide professional consultancy fees within the stage 1 PQQ/ITT tender. The contractor should allow for their own internal design management within the prelim costs provided within the first stage tender process.

The 1st stage tender has been publicly notified using the 'Find a Tender' platform and comprises a series of pre-qualification questions (PQQ) covering financial/cost, quality, experience, Health & Safety and geographical factors. A short list of no more than 3 contractors will be selected from the 1st stage process to enter into a 2nd stage competitive tender process.

The anticipated programme is set out in Appendix B with an estimated 15 month (64 week) build period. The project will be phased with sectional completion as set out on the proposed phasing drawing, with a total of 4 sections as follows:

- Section 1: Phase 2A MUGA and associated landscaping
- Section 2: Phase 3A New school building and associated landscaping
- Section 3: Phase 4A & 4B Demolitions of existing modular building and site clearance/demolitions of existing landscaping.
- Section 4: Phases 5A, 5B & 5C completion of landscaping

PQQ/INVITATION TO TENDER (ITT) DOCUMENT



It is to be assumed that phases 1A (temporary modular building) 1B (works to existing building), 4C (removal of temporary modular building) & 6A (works to existing building and external early years play area) are outside of the main contract.

Preliminaries & OHP within Part 3 should be calculated based on the proposed sections and phasing drawing provided within the PQQ/ITT information.

2. Registering Interest & obtaining the PQQ/ITT documentation

All interested bidders should register interest with Thinking Buildings to obtain the full PQQ/ITT tender information using the following email address:

tenders@thinking-buildings.co.uk

The PQQ/ITT pack will be issued within 3 working days of registering interest

3. Instruction to Tenderers & Conditions of Tender

The purpose of this Invitation to Tender is to select a contractor shortlist for the 2nd stage competitive tender.

The tender documentation comprises the following Sections:

- PQQ/Invitation to Tender (ITT) document
- Appendix A: Stage 1 PQQ/ITT Pre-Qualification & Quality Assessment Questions
- Appendix B: Project Delivery Programme
- Appendix C: List of PQQ/ITT Drawings and design information
- Appendix D: Stage 1 Tender ITT/PQQ Form of Tender incorporating an acceptance of the Terms and Conditions and collusive tendering statement.

This ITT documentation is to be read in conjunction with all supporting documentation.

A full site visit is not available within the 1st stage PQQ/ITT process. Tendering contractors are welcome to view the site from the public highway and to undertake the necessary desktop review. Full site visits will be arranged for shortlisted contractors during the stage 2 ITT process.

4. Tender Programme

The quotation should be based on the project delivery programme included within the ITT appendix B.

The anticipated 2 stage Design & Build tender programme is as follows:

| Design & Build Tender Stage 1 - ITT/PQQ | |
|---|---|
| Date | Stage |
| Tuesday 30th September 2025 | Public notification of tender |
| Friday 31st October 2025 | PQQ Tender deadline and tender returns |
| Friday 14th November 2025 | Completion of Tender Evaluation & notification of shortlisted tenderers |
| Friday 12th December 2025 | End of stand down period (4 weeks) |
| Friday 12th December 2025 | Shortlisted bidders notified and invited to stage 2 ITT process |

PQQ/INVITATION TO TENDER (ITT) DOCUMENT



| Design & Build Tender Stage 2 - ITT Competitive tender | |
|--|---|
| Date | Stage |
| Monday 5th January 2026 | Issue of 2nd stage of Employers Requirements & tender information |
| Friday 6th March 2026 | Tender deadline and return date (9 week tender period) |
| Friday 20th March 2026 | Tender Evaluation & Tender queries |
| Wc 23rd March 2026 | Contractor interviews |
| Friday 17th April 2026 | Completion of value engineering and confirmation of final price |
| Friday 23rd April 2026 | Notification of preferred bidder |
| August 2026 (TBC) | Contractor appointment (subject to FBC funding approvals) |
| November 2026 (TBC) | Commencement of construction (subject to FBC funding approvals) |
| 64 wks from possession date | Completion & Project handover |

The bidder will provide a delivery programme within the tender return, highlighting any risks or concerns. Should the contractor not agree with the anticipated time scales they must declare within the tender return.

5. Tender Assessment

Stimulating the local economy and using trusted local suppliers and contractors experienced in delivering educational projects are important considerations for the Diocese of Oxford. Tendering main contractors must be based and operate within 100 miles of the proposed works (based on the office and key personnel that would actually be managing the works). Contractors based further than 100 miles from the site, those with no relevant educational experience will be immediately excluded from the PQQ/ITT process. Contractors that have been subject to recent HSE prosecutions will also be excluded from the process.

All contractors must meet the requirements set out in the initial Pre-Qualification Questions to progress to the quality and price assessment. Bidders falling to pass the PQQ questions will be disregarded from the process.

Bidders meeting the initial PQQ requirements will be assessed based on Quality and Financial criteria. The Financial and Quality scores will be added together to produce a combined score out of 100% and each tenderer will be ranked according to the combined score. In the event of a tie break, where two or more

PQQ/INVITATION TO TENDER (ITT) DOCUMENT



bidders obtain the same total score, the Tenderer with the highest overall quality score will be deemed the highest ranked Tenderer.

A shortlist of no more than 3 tenderers will be selected based on best value i.e. a balance between cost and quality and the tenderer is to complete the quality and financial sections in the Tender Return document.

Based on the information provided by Tenderers, each submission will be evaluated based on the following:

| Design & Build Tender Stage 1 - ITT PQQ | |
|--|-------------|
| Pre-qualification questions (PQQ) | Pass/fail |
| Quality | 50% |
| Price | 50% |
| Total | 100% |

See Appendix A for the pre-qualification questions, Quality Assessment and financial Assessment questions.

| Design & Build Tender Stage 2 - ITT Competitive tender | |
|---|-------------|
| Quality | 15% |
| Price | 85% |
| Total | 100% |

Please note that the client reserves the right to preclude or disregard any tenders that are considered unrealistic or unreasonable.

6. Tender Evaluation Criteria

The stage 1 PQQ/ITT evaluation will be based on a weighted cost and quality scoring criteria as set out in the table below.

| Evaluation Criteria | Weighting |
|---|------------------|
| Part 1: Pre-qualification questions (PQP) | Pass/Fail |
| a. Is the contractor's office that will be responsible for delivering and managing the works within 100 miles of the proposed site? Tenderers further than 100 miles will fail this question and will be disregarded from the process. | Y/N |
| b. Has the contractor had experience of delivering similar relevant education projects? Contractors without relevant educational experience will fail this question and will be disregarded from the process. | Y/N |
| c. Has the bidder been subject to any H&S Prosecutions in the last 5 years | Y/N |
| Part 2: Quality | 50% |
| a. Distance of operating office to proposed works | 5% |
| b. Relevant experience & of similar projects and procurement | 25% |
| c. Programme Quality & Management | 10% |
| d. Design, Construction & Cost Risk | 5% |
| e. Health & Safety | 5% |
| Part 3: Financial (refer to SKP3 Financial Tender form) | 50% |
| a. Overheads & Profit | |
| b. Preliminaries (including design management) | |
| c. Performance bond to cover the works £ | |
| Total | 100% |

7. Obligations to Tenderer and Tender Pricing Documents

Tenderers must ensure that they are fully familiar with the nature and extent of the obligations of the Instructions to Tenderers and Conditions of Tender, Tender and Pricing Document and be aware that the performance standards will be strictly enforced. The Tenderer will be deemed to have read, examined and accepted the Instructions to Tenderers, Tender and Pricing Document and the requirements contained

therein prior to the submission of the Tender. It is the responsibility of Tenderers to obtain themselves, at their own expense, all information necessary for the preparation of their tender.

8. Expenses/Losses

The Client will not be responsible for payment of costs, expenses or losses which may be incurred by any Tenderer in the preparation and submission of their Tender.

9. Successful & Unsuccessful Tenders

Notification will be given to successful tenderers for stage 1 on the 12th December 2025. Unsuccessful bidders will not be automatically notified and it should be assumed that the bid was unsuccessful if you have not been notified within 2 weeks of the above date.

10. Invitation to Tender Material

ITT material means information issued to the Tenderer by the Client or on its behalf, or to which the Tenderer has been given access, for the purposes of this ITT. ITT material remains the property of the Client or other owners and is released solely for the purpose of tendering.

The Intellectual Property in ITT Material will belong to the Client or a third party. The ITT Material may only be used for the purpose of responding to this ITT and shall not be copied or disclosed to anyone other than employees of the Tenderer involved in the preparation of the tender, without the prior written approval of the Client. Client or the third-party owner may suffer damage for which compensation may be sought from a Tenderer, if the Tenderer discloses the ITT Material other than to employees involved in the tender preparation or uses the ITT Material other than for the purpose of tendering.

11. Sub-Contractors

The tender will not be authorised to sub-contract the main contractor role.

12. Accuracy & Errors in Tenders

You are advised to check the accuracy of your Tender prior to submission. Tenderers will be given the opportunity to confirm their offer or amend it to correct genuine errors.

13. Form of Contract

JCT Design and Build Contract (DB), 2024 Edition with an assumed 3% retention.

14. Insurance

New build works to be insured by the contractor for the duration of the works.

Bidders, and all design consultants, are required to have the following minimum levels of insurance:

| | |
|-----------------------------|---|
| Employers Liability (EL) | Minimum £10 million in any one occurrence |
| Public Liability (PL) | Minimum £10 million in any one occurrence |
| Professional Indemnity (PI) | Minimum £7 million for any one claim and in aggregate |

It is the bidders responsibility to qualify in the tender return any variation from the above stated insurance requirements.

Duty of Care & Liability Period for Designers:

As part of the stage 2 ITT tender process all designers will be required to exercise reasonable skill, care and diligence to be expected of a consultant experienced in the provision of such services for projects of a similar size, nature and complexity. All appointments would be subject to the law of England and Wales. Unless agreed otherwise, the contract will be a deed where the time limitation for a party of this contract to bring a claim for breach of contract is 12 years.

Unless otherwise agreed by the client, all design consultants will be required to meet the above minimum insurance cover limits.

Collateral warranties:

As part of the stage 2 ITT tender process, It is to be assumed that all consultants will be required to enter into a standard, unamended form of Collateral warranty with Oxfordshire County Council to include two assignments. Any associated legal fees and costs should be covered within the bidders quoted overheads & Profit figures quoted in the stage 1 tender bids.

15. Confidentiality

Tenderers are to note the following:

- They must not communicate any figures or other information indicating tender prices to any third party before the time set for the return of Tenders. (The only exception to this requirement is for the obtaining of insurance or bond quotations, such information to be given in strict confidence).

- They must not obtain or try to obtain any information in connection with any other Tender before the time set for the return of Tenders.
- They must not make or discuss any arrangement with any third party regarding whether or not they should tender, or about their, or any other party's Tender.
- They shall not, without any prior approval in writing, take, or authorise the taking of, any photographs of any project for use in publicity or advertising or publish alone, or in conjunction with others, any articles, photographs or other illustrations relating to any project or any part thereof, nor impart to any publication, journal, newspaper, film or any radio or television programme any information relating to any project.

16. Conflicts of Interest

The concept of a conflict of interest includes any situation where one or more relevant staff member(s) or representative(s) of the Employer involved in this procurement have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure and/or affect the integrity of the contract award.

If the Tenderer is aware of any circumstances giving rise to a conflict of interest or has any indication that a conflict of interest exists or may arise they should inform the Employer of this as soon as possible (whether before or after they have submitted a Tender). Tenderers should remain alert to the possibility of conflicts of interest arising at all stages of the procurement and should update the Employer if any new circumstances or information arises, or there are any changes to information already provided to the Employer. Failure to do so, and/or to properly manage any conflicts of interest may result in a Tender being rejected.

Provided that it has been carried out in a transparent manner, routine pre-market engagement carried out by the Employer should not represent a conflict of interest for the Tenderer.

17. Tender Queries and Site Visits

During the tender period all queries should be directed to Bethan Axford, Thinking Buildings Limited using the following email address stating **TENDER QUERY: Grove Primary School Expansion FAO Bethan Axford**

tenders@thinking-buildings.co.uk

Thinking Buildings will endeavour to respond to all written tender queries within three working days and these will be communicated to all tenderers that have successfully met the initial PQQ questions and criteria.

18. Tender Information / Revisions

At any time after the issue of the Invitation to Tender, the Client reserves the right to issue changes to Tender Information/requirements. Tenderers, when preparing their submissions, must, as with the information generated by Tender Queries and Responses take these changes into account in tender returns.

No alterations or qualifications to any of the tender documents shall be made unless they have been agreed in writing with Thinking Buildings.

Thinking Buildings will communicate any alterations or clarifications to the ITT to all bidders prior to the tender deadline.

19. Tender Acceptance

The Client does not bind itself to accept the lowest or any tender and may refuse to consider any Tender which is incomplete or qualified in any way or not completed in strict accordance with the instructions contained within the Invitation to Tender.

The Trust reserves the right to:

- Waive or change the requirements of this ITT from time to time without prior (or any) notice;
- Seek clarification of a Tenderer's submission;
- Withdraw this ITT at any time, or to re-invite Tenders on the same or any alternative basis;
- Choose not to award any tenderer the project as a result of the current procurement process;
- Award the quoted services and work stages in full or in part;
- Reject an offer from a Tenderer for the sole reason that the amounts which the Tenderer proposes to charge are abnormally low, regardless of the other merits of that offer.

20. Tender Return Information

All tenders are to be returned to Thinking Buildings as set out below.

The closing time and date for receipt of the stage 1 tender is **12:00 noon on Friday 31st October 2025**. Any tender submissions received after the closing date will be rejected. Tenders not in accordance with these instructions will be rejected.

PQQ/INVITATION TO TENDER (ITT) DOCUMENT



Tenderers shall complete and return the following items:

- Completed Form of Tender incorporating an acceptance of the Terms and Conditions and collusive tendering statement. The Form of Tender must be submitted duly signed. Any items for which you are unable to offer a price should be identified. Any other revisions to the Tender may invalidate the tender submitted.
- Completed Appendix A - Pre-Qualification, Quality Assessment and Financial Assessment Questions & Supporting information

The Client cannot undertake to give consideration to any tender submitted otherwise, including telephone, email, and facsimile.

Tender responses will not be opened or viewed until after the closing date for receipt of tenders has elapsed.

Tenders should be sent via email to tenders@thinking-buildings.co.uk and marked as the following:

TENDER: Grove Primary School Expansion FAO Bethan Axford

PQQ/INVITATION TO TENDER (ITT) DOCUMENT



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