

How to commission a design team



Introduction

This document is aimed at organisations intending to submit an application to the Big Lottery Fund (BIG). While we hope that it will be helpful to a wide range of applicants, it is primarily targeted at community-based organisations applying for capital grants for projects involving land and/or buildings. You should read this alongside our 'Project Brief: A guide to applicants'.

Our requirements

Your organisation has overall responsibility for the project. Land and building projects are often complex and you need to keep within the law as well as complying with our terms and condition of grant.

BIG expects that you will appoint appropriate qualified independent professional advisers, referred to as building professionals, to advise you on your project and to confirm that you have met those obligations, terms and conditions. Working together these building professionals are usually referred to as the design team.

For any project services with a value over £10,000 BIG require a minimum of three tenderers. The tender process should be open, fair and on a consistent basis. In addition, dependant on the value of the design services there may be a requirement to comply with the European Community statutory legislation on tendering (details of the threshold and process can be found at www.ojec.com).

Obtaining fee tenders

Following completion of your Project Brief you will now be in a position to seek tenders from prospective design teams (or individual discipline consultants if appropriate).

You should include your Project Brief within the single document issued to prospective consultants as you seek to secure tenders on a consistent basis. 'Project Brief: A guide to applicants' is available from our website www.biglotteryfund.org.uk or by calling our enquiries line on 0300 123 7110.

As with a Project Brief the key components of your tender document will remain consistent.

- ▶ Objectives: define the aims of the commission
- ▶ Tender Process: including timescales for submission, interviews and notification of the decision; the return date and to whom they should be addressed.
- ▶ Service Description: whether the appointment will be a combined design team under a lead consultant or separate individual commissions.
- ▶ Content of tenders: details of the team members, their experience, examples of similar community-based projects they have recently completed; methodology for undertaking the commission, anticipated programme, pricing structure of the fee proposal (lump sum, %, negotiable); will a presentation be necessary; define any specific exclusions or further services or disciplines tenderers might consider appropriate together with indicative fee levels; referees; define any particular format the tender are to be provided in e.g. hard copies and electronic together with how many copies.
- ▶ Criteria for evaluation: define if the selection will be solely on price or if there will be a Price/ Quality evaluation and what that ratio will be.
- ▶ Ownership of materials: state that ownership of all materials and information which form part of the commission will remain the property of your organisation.
- ▶ Statement of confidentiality or publicity: advise prospective tenderers that no publicity of the project information or any other output associated with the commission will be allowed, for any reason, without first obtaining the express written approval of your organisation.

Assessing tender submissions and selection of design team

As a community-based organisation the selection of the appropriate design team is an important factor in delivering a project which successfully meets those needs identified within your community. This principle applies equally to organisations experienced in land/or building projects and those who have limited or no experience.

Selection on the basis of a Price/Quality evaluation method allows a more in-depth consideration of the offers and the suitability of a particular design team or individual design consultant to satisfy your organisation's defined requirements, aspirations, aims and objectives for your project. It is likely that you will have a selection panel in place who will also, where appropriate, undertake the interviews. This may be the project sub-committee set up specifically for this project or your management committee.

Interviews allow you to meet with organisations representatives face to face before deciding. The interview will allow you to satisfy yourself that you will be able to work with them.

When adopting a Price/Quality evaluation, an outline of the criteria on which the quality assessment will be made should be stated within the tender document.

Where selection is stated as purely on a price basis then, following a review of the submissions to ensure consistency of service provision, it is likely to be the lowest tender who is accepted. If you do not intend to accept the lowest tender you must explain to BIG the reasons for this and obtain our consent. In addition, you should maintain a written record of the reasons for non-selection of the lowest tender in the event that clarification is sought from any of the tenderers.

It is important that you adopt a consistent approach when assessing the tenders. This will help you to compare the tenders against each other and to reach an appropriate decision. There is no set approach for assessing each tender, however, one approach is to use a system involving scoring and weighting.

In this case each tender is assessed against a number of pre-defined criteria that you consider to be important.

Each tender is then assessed against each criterion and is given a score on a scale from 0 to 10, based upon the extent to which it contributes to achieving your project outcomes and your selection decision.

A score of 0 indicates that it fails to contribute to the outcomes and your selection decision.

Some criterion will be more important than others in helping you to achieve your outcomes and reach a selection decision. The weighting element allows you to take this into account and remains consistent across all tenders. A higher weighting would be set for those criterion which are important to you with a lower weighting set for the less important criterion.

Once the tender has been allocated a score for each criterion, the weighting factor is then applied to the score to produce an overall weighted score.

Table 1 shows a sample assessment system

Tender X			
Criterion	Score	Weighting	Weighted Score
Understanding of the aims and requirements of the project	6	10	60
Overall quality and content of submission	8	5	40
Experience and evidence of similar community-based projects	4	10	40
Allocation of suitably qualified and experienced staff	9	8	72
Attitude to sustainable building and renewable technologies	8	9	72
Approach and Methodology	7	7	49
Timescales for delivery of commission	5	10	50
TOTAL			383

Next steps

After you have completed your Project Brief and selected your design team, you will start on the process of delivering your project. This will include options appraisals and a feasibility study.

Please refer to the Investing in Communities Guidance Notes and User Help Notes on our website together with the “Land and Buildings Guidance Notes for Scotland” for additional information and the key areas that we expect your application to include. (www.biglotteryfund.org.uk).