

SCOTTISH HOSPITALS INQUIRY

Hearing commencing on 24 April 2023

Bundle 14 - Supplementary

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SCOTTISH HOSPITALS INQUIRY**Supplementary Witness Statement of
Michael Baxter (“Mike Baxter”)
Prepared for hearing commencing 24 April 2023****4 April 2023**

Preliminaries

1. I am Mike Baxter. This witness statement follows and, where appropriate, expands upon the evidence that I provided to the Inquiry within my witness statements dated 20 April 2022 and 14 February 2023 and the oral evidence that I gave to the Inquiry on 16 May 2022.
2. I understand, from feedback received following informal discussions between the Inquiry’s legal team and those representing the Scottish Ministers, that the Inquiry wishes to obtain further evidence as to the role and conduct of the Scottish Government in relation to RHCYP/DCN during the period from a meeting of the project steering board in August 2014 to the project’s financial close in February 2015.
3. As I explained in my earlier statements, the Scottish Minister’s oversight of the RHCYP/DCN was conducted via the business case review process undertaken by CIG. That process does not, however, take place in isolation. It is an iterative process and involved regular dialogue between myself (and others within the SGHD) NHSL, SFT, HFS, HPS and others. Standing the passage of time I am reliant upon documentary evidence to refresh my memory as to what was discussed, with who and when. Having had the opportunity to review minutes of meetings and contemporaneous correspondence, I can now provide the following additional information.

Public Private Partnership (“PPP”) - Finance

4. NHSL could not have constructed RHCYP/DCN without the approval of CIG/Scottish Ministers. SGHD administers and oversees NHS Scotland's budget including the budget related to infrastructure investment, such as RHCYP/DCN. Without appropriate funding allocations NHS Scotland Boards do not have funds to deliver infrastructure projects whether funded by public capital budgets or via private finance routes such as NPD.
5. PPP involves sharing the financial burden of delivering capital projects between the private and public sectors. In relation to RHCYP/DCN this was achieved through the NPD model of PPP investment. Under that model IHSL were to design and construct RHCYP/DCN (and provide some facilities management services). IHSL were also, in the first instance, responsible for raising the finance required to build and construct the hospital. The cost of that finance is charged back to NHSL across the lifetime of the project. This is recognised in the “unitary charge” paid by NHSL at regular intervals over the lifetime of the project.
6. NHSL appointed its preferred bidder, IHSL, in March 2014. IHSL were appointed to design and construct RHCYP/DCN (and provide some facilities management services). Following appointment, IHSL and NHSL worked together to agree how the hospital should be built. In due course, these agreed terms are reflected in the project agreement (the contract) between NHSL and IHSL. In a PPP project that agreement is concluded at financial close.
7. There are two important points worth noting in relation to the PPP projects. Firstly, the final cost of a project cannot be known until the project agreement has been concluded because, up until that point, there are number of variables related to cost that require to be agreed. Secondly, IHSL cannot deliver the project without the approval of their funders/lenders. Those funders/lenders are investing considerable sums in the project. Accordingly, those funders/lenders are required to undertake their own due diligence processes before confirming

their support. This involves their own legal and technical analysis of the project agreement.

8. NHSL and IHSL had to work together to ensure the effective delivery of the project, however, if IHSL had not been able to secure its funder/lender support for the project agreement then the project could not have proceeded.

SGHD/CIG's Consideration of the FBC for RHCYP/DCN (August - December 2014)

9. The outline business case for the current iteration of the RHCYP/DCN hospital was recommended for approval by CIG in 2012. This allowed NHSL to proceed to procurement. As I explain above, IHSL were appointed as the preferred bidder in March 2014 and, thereafter, worked with NHSL to finalise the design of the hospital.
10. CIG met on 5 August 2014. **(A35051430 – Minutes of meeting of Capital Investment Group on 5 August 2014, Bundle 14, Page 24)**. I was present and chaired the meeting. Representatives of NHSL attended the meeting and provided an update as to how the RHCYP/DCN project was developing. The relevant part of the minute of the meeting records:

Colleagues from NHS Lothian gave a presentation on the development of the RHSC and DCN project and the current position with regard to commercial negotiations. The presentation was then followed by a question and answer session. The Chair thanked colleagues from NHS Lothian for their contribution.

11. CIG next met on 26 August 2014. **(A35001841 – Minutes of meeting of Capital Investment Group on 26 August 2014, Bundle 14, Page 27)**. I was not present at the meeting. Steven Hanlon chaired the meeting in my absence. Steven Hanlon was, at the relevant time, a Capital Finance and Policy Manager working within the Health Finance Directorate. In advance of the meeting NHSL's Full Business Case ("FBC") had been submitted to SGHD and

circulated amongst CIG's members for review. CIG did not resolve to recommend the FBC for approval at this meeting. The relevant part of the minute of the meeting records:

Not approved at this meeting due to a number of outstanding comments. Steven Hanlon highlighted the increase in the non-NPD costs compared to the OBC. NHS Lothian had been informed that Scottish Government would fund these costs to the FBC level but would not guarantee funding beyond this.

Details of the project indicate that there will be initially unutilised space within the paediatric / bio-chemistry units.

The Group agreed to write to the Board and ask for supporting justification for the shelled areas and timescales for bringing it into service.

Any justification from the Board regarding the unutilised space must be specific about the assumptions that underlie any future plans ie about population projections/future demand/service expansion etc?

Formal approval of this project to follow once queries had been resolved.

12. Accordingly, as at 26 August 2014, there were two issues that CIG were aware of from the FBC that prevented CIG from recommending the FBC for approval.
13. Firstly, CIG required clarity as to the level of NPD costs (i.e. the costs of the project) the Scottish Government would be required to meet. The Scottish Government had, however, already advised NHSL that it would cover the costs detailed in their FBC(albeit, not beyond that level). As the RHCYP/DCN was an NPD PPP project, these costs could not be known until the project actually reached financial close.

14. Secondly, the designs submitted as part of the FBC contained “shelled areas” (in other words, unused space). CIG are, amongst other things, required to consider whether the project proposed in NHSL’s full business case represents the best value commercial solution for delivering the project requirements within the project’s affordability¹. Where, as in this case, a design contained unutilised space this requires to be justified within the full business case. If it is not, then CIG are unlikely to be satisfied that the proposed project represents the best value. CIG are unlikely to recommend for approval projects that include the cost of building unused space if it cannot be shown that this represents the best value commercial solution.
15. Both of the issues identified at CIG’s meeting of 26 August 2014 were high level “economic” issues. This is consistent with CIG’s, primarily, economic/financial role in relation to the delivery of capital and revenue funded capital healthcare projects and based on a review of the content of the FBC submitted to CIG for consideration.
16. On 17 September 2014, I sent Brian Currie a letter, by email, with the “*one follow up issue from CIG*”. **(A34982523 – Email from Mike Baxter to Brian Currie attaching letter in relation to follow up issue raised by CIG dated 17 September 2014, Bundle 14, Pages 31/32)**. The relevant section of that letter provides:

The Group noted that the business case refers to some accommodation within the new facilities being shelled initially. The Group asked if you could expand on your initial response to comments on this. In particular, the Group would be grateful if you would share

¹ Scottish Capital Investment Manual - 2017 - FBC - pg 1 - “*The purpose of the Full Business Case is to confirm that the procured offer represents the best value commercial solution for delivering the project requirements within the project’s affordability limits; and to demonstrate that appropriate contractual, commercial and management arrangements are in place to successfully deliver the project.*”

Scottish Capital Investment Manual - 2014 - pg 17 - “*The purpose of the FBC is to revisit the OBC and record the findings of the subsequent procurement. It also sets out the recommendation for an affordable solution which continues to optimise VFM and sustainability considerations, and includes detailed arrangements for the successful delivery of goods and implementation of services from the recommended supplier.*”

the activity projections that support the future need, and set out your projected timeline for bringing these areas into service. In addition, the Group suggested that the logic supporting the shelled accommodation should be made explicit in the final version of the business case.

17. This letter sought further information in relation to the “shelled area” issue identified by CIG. This was the only issue, of the two identified by CIG, that could be resolved at that time. As I explain above, the issue related to NPD finances would only crystallise at financial close.
18. By 29 September 2014 I was yet to receive a response to my email of 7 September. I sent Brian Currie a chaser email. Jackie Sansbury responded to my emails on 1 October 2014 with the additional information I had requested. This information was forwarded to my colleague Yvonne Summers and Colin Proctor of SFT (those who had initially queried the shelled space) on the same day. Yvonne Summers considered this information on 7 October 2014 and confirmed she was content with NHSL’s justification. These emails relate to **(A43277400 – Emails between NHS Lothian and Scottish Government discussing outstanding issues dated 17 September to 7 October 2014, Bundle 14, Page 37)**
19. CIG next met on 7 October 2014. **(A35001842 – Minutes of meeting of Capital Investment Groups on 7 October 2014, Bundle 14, Page 33)**. I was not present at this meeting and Steven Hanlon chaired the meeting in my absence. Yvonne Summers was also absent. It is recorded in the minute of the meeting that:

Steven Hanlon is writing to NHS Lothian on remaining issues on the Royal Hospital for Sick Children and DCN - FBC and we are awaiting a response from Yvonne Summers on the Board response to shelled areas issues.

20. The remaining issues that Steven Hanlon was writing to NHSL about related to NPD costs. Yvonne Summers consideration of NHSL’s justification for shelled

space remained outstanding at the point CIG met (albeit, and as explained above, it was approved later that same day).

(A43277402 – Emails between CIG and NHS Lothian in relation to outstanding cost issues dated 15 to 27 October 2014, Bundle 14, Page 42).

21. On 15 October 2014 Steven Hanlon emailed Sorrel Cossens (project manager at NHSL). The relevant section of his email states:

“...We are ready to approve the project and have the letter and funding conditions drafted, so we’re not waiting on anything from you and there aren’t any queries outstanding.

I’ve held off getting the letter out because Kerry Alexander mentioned that there was a potential change of construction costs of around £0.4-0.5m, as you worked with the preferred bidder...”

22. At the relevant time, Kerry Alexander was an investment programmes director, employed by SFT. This is a financial position. Kerry is a chartered accountant.
23. As at 15 October 2014, CIG were content to approve NHSL’s FBC subject to crystallising issues related to NPD costs. Steven Hanlon’s email confirms my recollection of events.
24. Steven Hanlon emailed Sorrell Cossens on 27 October 2014 chasing a response to his email of 15 October.
25. Lynn Allan (NHSL project accountant, RHCYP/DCN) responded to Steven Hanlon’s email on the same date. Lynn Allan explained that Brian Currie would be providing further information on overall costs in due course. She also provided further information related to the £0.4-0.5m point raised in Steven Hanlon’s email.

26. On 13 November 2014 Steven Hanlon emailed myself and Kerry Alexander. He advised that “...we are about ready to do the approval letter for Sick Kids...” and attached a version of the letter for review. The letter he was drafting was the letter to NHSL confirming the funding that the Scottish Government had approved for the RHCYP/DCN project and the conditions relative thereto. I responded to Steven Hanlon with my comments the next day. Kerry Alexander responded with her comments on 16 November. She suggested revising a clause in the funding approval letter related to financial close being reached in November 2014. Her suggestion related to the potential for a later than planned date of financial close taking into consideration “...the current status of the deal”. (See my further comments in relation to a meeting of the project steering board commercial sub-group of 21 November 2014 in relation thereto below.) Steven Hanlon circulated a revised version of the letter on 17 November 2014.

27. CIG next met on 25 November 2014. **(A35001837 – Minutes of meeting of Capital Investment Group on 25 November 2014, Bundle 14, Page 45)**. I was present and chaired the meeting. The minute of the meeting records:

NHS Lothian – Royal Hospital for Sick Children and DCN – FBC - this case is progressing with financial close expected by the end of January subject to any unexpected delays.

The approval letter is still to go out but other issues have been dealt with.

28. Accordingly, as at 25 November 2014, CIG were content that the RHCYP/DCN project was progressing towards financial close and whilst the approval letter was still to be sent out, the issues (identified at CIG’s meeting of 26 August 2014 based on a review of the FBC) had been dealt with.

29. CIG met again on 16 December 2014. **(A43277405 – Minutes of Capital Investment Group on 16 December 2014, Bundle 14, Page 49)**. I was

present and chaired the meeting. The RHCYP/DCN was not discussed. This was my last CIG meeting. I moved from the Scottish Government to Transport Scotland shortly thereafter. I did not have any further substantive involvement with the RHCYP/DCN.

CIG's Consideration of the FBC for RHCYP/DCN (January 2015 - April 2015)

30. IHSL and NHSL reached financial close on 12 February 2015. As I was not working for the SGHD at the relevant time I cannot provide any first hand commentary on any discussions that took place during this time.
31. I have, however, considered a letter sent to NHSL from Paul Gray (the then Chief Executive of NHS Scotland and Director General, Health and Social Care) dated 10 February 2015. **(A43277397 - Letter from Paul Gray to Tim Davidson confirming award of revenue funding dated 10 February 2015, Bundle 14, Page 62)**. This letter confirms the Scottish Government has agreed an award of revenue funding for RHCYP/DCN following CIG's consideration of the FBC. The letter advises, amongst other things, that further information as to funding requirements will follow.
32. I have also considered a letter dated 12 February 2015 sent by John Matheson (the then Scottish Government Director of Finance, eHealth and Analytics') to NHSL. This is described in an email from Alan Morrison, dated 12 February 2015, as the revenue funding support letter. **(A43277387 – Email from Alan Morrison to Tim Davidson dated 12 February 2015 attaching letter from Paul Gray to Tim Davidson confirming details in relation to revenue funding dated February 2015, Bundle 14, Pages 63/64)**. This letter is the final version of the letter that was being discussed by myself, Steven Hanlon and Kerry Alexander in November 2014 (see paras 21 and 26 above).
33. Whilst I was not privy to the discussions that led to the issuing of the letters described in the preceding two paragraphs I can only surmise that the correspondence and discussions relative to approval of revenue funding that I

describe at paras 19 - 25 above continued up until financial close: the point in time at which the Scottish Government could approve an award of revenue funding for the project.

34. I note, from documents provide to me, that an addendum to NHSL's final business case was brought to a meeting of CIG on 28 April 2015. **(A43277395 – Draft Minutes of meeting of Capital Investment Group on 28 April 2015, Bundle 14, Page 68)**. The addendum was a standard stage in the process. It recorded the finalised costs of the project following financial close. No further approval steps arise at this stage in the process, so CIG would simply be asked to note the content of the addendum.

Project Steering Board/PSB Commercial Sub-Group

35. I understand the Inquiry may be interested in my attendance at project steering board meetings and, in particular, a meeting of the project steering board in August 2014 and those that followed thereafter. With a view to assisting the Inquiry in relation to these matters I have set out some additional information below regarding my recollection and involvement with these meetings.
36. At paragraph 5 of my statement dated 20 April 2022, I explained that Scottish Government representatives (including myself) attended project board meetings in relation to the RHCYP/DCN and QEUH projects “...*in an observer capacity given their roles in the approval of projects as members of the CIG.*”
37. At paragraph 35 of his statement dated 11 April 2022, Alan Morrison expands upon the Scottish Government's interests when attending these meetings:

The Health Finance and Infrastructure team retains some oversight of the project until it is completed. This will involve discussions on timeline and affordability and any challenges the project may be experiencing. Usually that involves relevant officials from the Scottish Government meeting with members of the project team and/or sitting on project

boards (set up for delivery of the project) once business plans are approved.

38. I attended some, but not all, meetings of the project steering board for the RHCYP/DCN. I also attended some, but not all, of the meetings of the commercial sub-group of the project steering board. My attendance at these meetings was part of my ongoing engagement with NHSL and others (such as SFT) in relation to the RHCYP. I would only attend meetings if the subject matter was relevant to the Scottish Government's interests. For example, I would have been more likely to attend meetings discussing project finance, affordability and progress toward financial close, but less likely to attend meetings to discuss design or construction at a "project level". It was standard practice for NHSL to provide me with an agenda in advance of these meetings (along with any relevant papers) and a copy of the minutes of the meeting thereafter.
39. I attended a meeting of the project steering board on 22 August 2014 **(A43277749 – Minutes of a meeting of the Project Steering Board, 22 August 2014, Bundle 14, Page 71)**. I explain my recollection of this meeting at paras 44 to 46 of my witness statement dated 14 February 2023, I don't have any particular recollection of this meeting beyond what is recorded in the minutes of the meeting. It may be helpful to the Inquiry, however, if I put the observations that I am recorded as making at this meeting in context. The meeting records that I have sought assurances from IHSL in relation to their funders' technical adviser due diligence process (the process discussed at para 7 above). This process required to be completed before financial close. The original timetable for financial close had already been delayed by this point. Accordingly, I was seeking assurances around avoiding further delays. As is clear from my comments on page 2 of the minute, I was particularly concerned about the costs that delay could have on the price of funder credit:

MB asked what the impact there would be on the fixed pricing if the process to agree the cost plan and credit were further delayed. RB

confirmed that the pricing would be fixed for 90 days from the original financial close date of 02/10/14.

Increased credit costs could have required an increased funding commitment from the Scottish Ministers. At the close of the meeting I am recorded as encouraging parties to progress matters expeditiously. This is consistent with the Scottish Minister's interest to see the project delivered as soon as reasonably possible without incurring additional cost.

40. Neither I, nor another representative of the Scottish Government, attended the next meetings of the project steering board meeting on 26 September 2014 (**A43278018 – Minutes of a Meeting of the Project Steering Board, 26 September 2014, Bundle 14, Page 76**) and 21 November 2014 (**A43277396 – Minutes of a Meeting of the Project Steering Board, 21 September 2014, Bundle 14, Page 89**).
41. The commercial sub-group of the project steering board met on 26 September 2014 (**A43277392 – Minutes of a Meeting of the Commercial Sub-Group of the Project Steering Board, 26 September 2014, Bundle 14, Page 79**) and 31 October 2014 (**A43277384 – Minutes of a Meeting of the Commercial Sub-Group of the Project Steering Board, 31 October 2014, Bundle 14, Page 82**). Neither I, nor another representative from the Scottish Government, was present at these meetings. I note that at para 42 of Susan Goldsmith's statement dated 27 February 2023, she records that these meetings included representation from the Scottish Government. That is not correct. Whilst the Scottish Government was invited to these meetings they did not attend. As I explain above, however, I would have been provided with the minutes of the meetings and kept up to date of any relevant developments as part of my regular and continuing dialogue with NHSL and others.
42. I attended a meeting of the commercial sub-group on 21 November 2014. (**A43277388 – Minutes of a Meeting of the Commercial Sub-Group of the Project Steering Board, 21 November 2014 – Bundle 14 – Page 86**). I note that from the minute of this meeting that IHSL had proposed a further delay to

financial close. I expect this is why I decided to attend this meeting. The observations I am recorded as making relate to delays in reaching financial close. As I have said above, financial close is an important milestone for the Scottish Government.

43. There were not any more meetings of the project steering board or commercial sub-group between 21 November 2014 and my leaving the Scottish Government the following month.

STATEMENT OF TRUTH

44. I believe that the facts stated in this witness statement are true. I understand that this statement may form part of the evidence before the Inquiry and be published on the Inquiry's website.

SCOTTISH HOSPITALS INQUIRY

**Inventory of Documents
in relation to**

**Supplementary Witness Statement of
Michael Baxter (“Mike Baxter”)
Prepared for hearing commencing 24 April 2023**

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1. A43283930 - Minutes of meeting of Capital Investment Group on 15 July 2014
 2. A35051430 - Minutes of meeting of Capital Investment Group on 5 August 2014
 3. A35001841 - Minutes of meeting of Capital Investment Group on 26 August 2014
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17. A43277384 - Minutes of a Meeting of the Commercial Sub-Group of the Project Steering Board, 31 October 2014
18. A43277388 - Minutes of a Meeting of the Commercial Sub-Group of the Project Steering Board, 21 November 2014
19. A43277396 - Minutes of a Meeting of the Project Steering Board, 21 November 2014

**MINUTES OF THE CAPITAL INVESTMENT GROUP (CIG) MEETING HELD ON
TUESDAY 15 JULY 2014 AT 09.30 CONFERENCE ROOMS A AND B ST
ANDREW'S HOUSE**

Present: Mike Baxter
Yvonne Summers
Jim May
Colin Wilson
Reme Diaz
Lea Mann
Robert Peterson
Tracy Barschtschyk
Carmel Sheriff

Apologies: Colin Proctor
Marjorie Marshall
Gillian McCallum
Barbara Crowe

	1.	APOLOGIES
	1.1	The Chair, Mike Baxter introduced the meeting and apologies were noted.
	2.	MINUTES FROM THE LAST MEETING – 24 JUNE 2014
	2.1	The minutes of 24 June were taken as a true record of the meeting
	3.	ACTION POINTS FROM PREVIOUS MEETING
	3.1	<p>Before looking at action points from the last meeting, Mike updated the group on some progress on action points from earlier meetings:</p> <p>NHS Greater Glasgow and Clyde - Eastwood / Maryhill – Hub co negotiations are continuing – there should be a September financial close to this case – Cost escalation discussions are also continuing.</p> <p>The 5th August CIG meeting will be a busy schedule with 3 presentations – NHS Forth Valley - Royal Hospital / NHS Dumfries & Galloway – Midpark Hospital / NHS Lothian - Sick Childrens Hospital.</p>

ACTION POINT: MIKE BAXTER		<p>NHS Forth Valley - Doune Health Centre – A response is still awaited from the Board on this.</p> <p>NHS Grampian - Aberdeen Denburn – Yvonne is still awaiting receipt of checklist.</p> <p>NHS Orkney - New Hospital – OBC agreement has been reached – Mike to speak with project director today</p>
	3.2	Action point 3.9 – The new style / updated Business Case Timetable was introduced to the group by Colin. (see item 6 below).
	3.3	Action point 4.2 – Steven Hanlon has written to the Board on outstanding issues relating to NHS Lothian – Partnership Centre Bundle – OBC and these are currently being addressed.
	4.	GATEWAY REVIEW UPDATE
	4.1	<p>Tracey Barschtschyk update the group:</p> <p><u>Monklands Hospital</u> – GR2 – 16 to 18 June – DCA Amber – GR3 expected September / October 2014.</p> <p><u>Gartnavel General</u> – Outpatient Department – Assessment meeting on 29 July 2014.</p> <p><u>Ninewells Critical Care and Backlog Maintenance</u> – Assessment meeting on 7 August 2014.</p> <p>Assessment meetings are still to be arranged for – Ward Redesign Programme / Building for Better Care Phase 3 / Victoria Hospital Kirkcaldy Tower Block / Programme of Estates Upgrade / Raigmore Critical Care / Partnership Centre Bundle Project.</p> <p><u>Clinical Change Programme</u> – It was agreed that the programme was too early to engage with PPM - CoE</p>
	5.	NHS NATIONAL SERVICES SCOTLAND – ABERDEEN PROPERTY COST REDUCTION – INITIAL AGREEMENT
	5.1	Responses received from the Board on comments from members of the group are satisfactory
ACTION POINT: MIKE BAXTER	5.2	Mike will write to the Board asking them to reflect their responses into the final draft public version of the case.
	6.	BUSINESS CASE TIMETABLE

ACTION POINT: COLIN WILSON	6.1	The group were generally happy with the new style version. Some suggestions were made by the group. Colin will incorporate these into it.
	7.	A.O.C.B – DATE OF NEXT MEETING – 5 AUGUST 2014
	7.1	It was recognized that good work was going on by the Boards on their longer term capital plans. Boards are to be asked to prepare work on projects in advance. Priority will be given to projects in development for example projects already at phase 1 – these schemes should be progressed forward.

**MINUTES OF THE CAPITAL INVESTMENT GROUP (CIG) HELD ON TUESDAY
5 AUGUST AT 9:30AM, CONFERENCE ROOMS A AND B ST ANDREW'S
HOUSE**

Present: Mike Baxter
Gillian McCallum
Jim May
Lea Mann
Robert Peterson
Tracy Barschtschyk
Colin Proctor
Marjorie Marshall
Kirsty Craig

Apologies: John Matheson
Christine McLaughlin
Chris Dodds
Lara Cook
Yvonne Summer
Paudric Osborne

	1.	PRESENTATION – NHS Lothian – Royal Hospital for Sick Children (RHSC) and Department of Clinical Neurosciences (DCN)
	1.1	Colleagues from NHS Lothian gave a presentation on the development of the RHSC and DCN project and the current position with regard to commercial negotiations. The presentation was then followed by a question and answer session. The Chair thanked colleagues from NHS Lothian for their contribution.
	2.	APOLOGIES
	2.1	The Chair, Mike Baxter introduced the meeting and apologies were noted.
	3.	MINUTES FROM THE LAST MEETING – 15 JULY 2014
	3.1	The minutes of 15 July were taken as a true record of the meeting

	4.	ACTION POINTS FROM PREVIOUS MEETING
ACTION – ALL CIG	4.1	<p>Mike Baxter confirmed that discussions had taken place with the Project Director at NHS Orkney and that agreement had been given to the Outline Business Case.</p> <p>The Chair had written to NHS National Services Scotland and asked them to reflect their responses into the draft public version of the business case for Aberdeen Property Cost Reduction, Initial Agreement.</p> <p>Colleagues were reminded to provide Colin Wilson with any comments on the format for the business case timetable.</p>
	5.	NHS GRAMPIAN, CHALMERS HOSPITAL AND HEALTH CENTRE – PPE – PAPER 31/4
	5.1	It was agreed to defer this PPE to 26 August given colleagues leave arrangements in NHS Grampian.
	6.	NHS WESTERN ISLES – ST BRENDAN’S HEALTH AND SOCIAL CARE CENTRE – OUTLINE BUSINESS CASE – PAPER 32/14
	6.1	A number of colleagues had raised issues on which a response from the Board was awaited.
	6.2	The Capital Investment Group agreed to deal with the outstanding issues via expedited procedures.
	7.	NHS LANARKSHIRE – MKBC THEATRES AND ICU RECONFIGURATION AND UPGRADE – OUTLINE BUSINESS CASE – PAPER 33/14
	7.1	Again a number of outstanding issues required to be resolved and the Capital Investment Group agreed to deal with outstanding issues via expedited procedures.
	8.	NHS Lothian – East Lothian Community Hospital – Initial Agreement – Paper 34/14
	8.1	A number of outstanding issues. The Capital Investment Group have agreed to deal with the case through expedited procedures.

	9.	BUSINESS CASE TIMETABLE – PAPER 35/14
	9.1	Colleagues noted the business case timetable. The Chair indicated that given the volume of cases scheduled for 26 August that a decision regarding the PPEs would be taken nearer the time with a possible view of deferring these to a future meeting.
	9.	AOCB & DATE OF NEXT MEETING – 26 AUGUST 2014
	9.1	There was no further business and the meeting was closed.

**MINUTES OF THE CAPITAL INVESTMENT GROUP (CIG) HELD ON TUESDAY
26 AUGUST AT 9:30AM, CONFERENCE ROOMS A AND B ST ANDREW'S
HOUSE**

Present: Steven Hanlon
Yvonne Summers
Colin Proctor
Christine McGregor
Lea Mann
Tracy Barschtschyk
Carmel Sheriff
Colin Wilson

Apologies: Mike Baxter
Gillian McCallum
Chris Dodds
Marjorie Marshall

	1.	APOLOGIES
	1.1	The Chair, Steven Hanlon (in Mike Baxter's absence) introduced the meeting and apologies were noted.
	2.	MINUTES FROM THE LAST MEETING – 5 AUGUST 2014
	2.1	The minutes of the 5 August were taken as an accurate record of the meeting.
	3.	ACTION POINTS
	3.1	<p>4.1 – Colleagues noted that the Business Case Timetable had been greatly improved and thanked Colin Wilson for his work on it. It was agreed that colleagues would provide any further comments as they arose to allow the timetable to evolve with the needs of the group.</p> <p>Steven Hanlon provided an update on the status of cases considered at the last meeting:</p> <p><u>East Lothian Community Hospital</u> – The IA for ELCH was approved. Group members will continue to work with the Board as the OBC is developed.</p> <p><u>St Brendan's Hospital</u> – Colin Proctor and Steven Hanlon were due to have a video conference with</p>

		Western Isles on some outstanding issues following this meeting. The design of the new facility is not sufficiently advanced to set a cost cap. In addition, clarity is needed about resourcing for the project team within the Board and about the interface between the Board and the hub company <u>MKBC Theatres</u> – Project approved and letter issued.
	4.	NHS Ayrshire and Arran – Arrol Park Resource Centre / Boiler Installation, Crosshouse / Radiology C.T Developments, Crosshouse – Post Project Evaluations
ACTION POINT – MIKE BAXTER	4.1	<p>The 3 Ayrshire and Arran PPEs were discussed together.</p> <p>The group noted the value in reviewing PPE's.</p> <p>A capacity issue was identified in more than one project, suggesting a degree of under-utilisation. Greater emphasis is required on planning assumptions.</p> <p>It was noted that demand for diagnostics is rising but there is a risk of equipment provision outstripping Boards' capacity to staff it. More information on planning estimates and projections should be provided in business cases.</p> <p>It was noted that there may be value in observations noted on PPEs being fed back to the NHS as a whole. It was suggested that this be considered under the SCIM review.</p> <p><i>Mike Baxter and the Capital and Facilities team to consider the best mechanism for spreading the lessons from PPEs</i></p> <p>All PPEs under discussion were noted by the group.</p>
	5.	See item 4 above
	6.	See item 4 above
	7.	NHS Lothian – Royal Hospital for Sick Children & DCN – Full Business Case – Paper 36/14
	7.1	<p>Not approved at this meeting due to a number of outstanding comments.</p> <p>Steven Hanlon highlighted the increase in the non-NPD costs compared to the OBC. NHS Lothian had</p>

<p>ACTION POINT – STEVEN HANLON</p>		<p>been informed that Scottish Government would fund these costs to the FBC level but would not guarantee funding beyond this.</p> <p>Details of the project indicate that there will be initially unutilised space within the paediatric / bio-chemistry units.</p> <p><i>The Group agreed to write to the Board and ask for supporting justification for the shelved areas and timescales for bringing it into service.</i></p> <p>Any justification from the Board regarding the unutilised space must be specific about the assumptions that underlie any future plans ie about population projections/future demand/service expansion etc?</p> <p>Formal approval of this project to follow once queries had been resolved.</p>
	8.	<p>NHSSCOTLAND – PHARMACEUTICALS SPECIALS SERVICE PROJECT – OUTLINE BUSINESS CASE – PAPER 37/14</p>
<p>ACTION POINT – STEVEN HANLON</p>	8.1	<p>The group discussed the risks around the staffing of the new facility and agreed that:</p> <p><i>Further details on plans and assumptions would be requested from the Board.</i></p> <p>Significant increase in cost with this project were discussed.</p> <p>The OBC will be approved once this action has been taken.</p>
	9.	<p>NHS Ayrshire and Arran – Addendum – Acute Mental Health and North Ayrshire Community Hospital – Full Business Case – Paper 38/14</p>
	9.1	<p>Addendum noted by group</p>
	10.	<p>NHS Forth Valley – Stirling Care Village – Outline Business Case – Paper 39/14</p>
<p>ACTION POINT MIKE BAXTER - & STEVEN HANLON</p>	10.1	<p>A number of issues were discussed with regard to this project. In particular there has not been adequate discussion of the service change elements with Performance Management. The details of the proposal are not sufficiently clear from the case.</p> <p><i>To write to the Board outlining the concerns and inviting the Board to a face-to-face meeting to discuss the case.</i></p>

ACTION POINT - ALL		<i>Colleagues to summarise their concerns.</i>
	11.	NHS GRAMPIAN – CHALMERS HOSPITAL – POST PROJECT EVALUATION
ACTION POINT – STEVEN HANLON	11.1	<i>To request update of document to reflect Group comments.</i> The PPE was noted by group.
	12.	GATEWAY REVIEW UPDATE – PAPER 40/14
ACTION POINT – TRACY BARSCHTSCHYK	12.1	Tracy updated the group as follows: <u>Gartnavel General Outpatient Department:</u> Possible GR2 in October 2014 – awaiting confirmation from SRO. <u>Ninewells Critical Care and Backlog Maintenance:</u> Held assessment meeting on 7 August. Too early to engage with programme team – get update in January 2015. <u>Victoria Hospital Kirkcaldy Tower Block:</u> Assessment meeting on 22 August. Too early to engage with project team. PPM-CoE to re-engage with the team in January 2015. <i>Tracy will e-mail Mike with an alternative assurance review.</i> Still to engage with: Ward Redesign Programme / BFBC-Phase 3 / Programme of Estates Upgrade / Raigmore Critical Care / Partnership Centre Bundle Project.
	13.	BUSINESS CASE TIMETABLE – PAPER 41/14
	13.1	Some further suggestions made by colleagues. Closer liaison with the Boards suggested to ensure what is on the timetable remains on schedule. Colleagues in general felt that the 4 weekly window was tight. It was suggested that notification be given at each meeting of the cases due to be considered at the next meeting. This would allow CIG members more ability to organise their workload. The group were informed that a presentation would take place at the next meeting – Royal Edinburgh Hospital.
	14.	AOCB & DATE OF NEXT MEETING – 16 SEPTEMBER 2014
	14.1	Colin Wilson reminded colleagues that the next meeting which will be followed by the SCIM meeting will be held at the Scottish Futures Trust building.

From: Baxter M (Mike) (Health)
Sent: 17 September 2014 17:00
To: 'Currie, Brian' [REDACTED]
Cc: Hanlon S (Steven); Summers Y (Yvonne); Wilson C (Colin) (Health); 'Kerry Alexander' [REDACTED]
Subject: NHS Lothian - Royal Hospital Sick Children & DCN - FBC

Brian

Please find attached a letter with one follow up issue from CIG. This is the only outstanding issue in need of resolution. In parallel with the Board responding to the attached I will pursue funding conditions with SFT in order to bring this to a conclusion.



CIG - NHS Lothian
- Royal Hosp...

Kind Regards

Mike Baxter
Deputy Director (Capital and Facilities)
Directorate of Finance, eHealth and Pharmaceuticals
Scottish Government Health and Social Care Directorates
Tel [REDACTED]
Mob [REDACTED]

Finance, eHealth & Pharmaceuticals Directorate
Capital and Facilities Division



T: [REDACTED]

E: Mike.Baxter@nhs.uk

Brian Currie
Project Director, Re-provision of RHSC and DCN
NHS Lothian
Waverley Gate
2-4 Waterloo Place
Edinburgh
EH1 3EG

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17 September 2014

Dear Brian

NHS Lothian – Royal Hospital for Sick Children and Department of Clinical Neurosciences – Full Business Case

As you are aware, the Full Business Case for the Re-provision of the Royal Hospital for Sick Children and Department of Clinical Neurosciences was considered by the Capital Investment Group (CIG) at its meeting on 26 August 2014. Following discussion before and during the meeting, the Group has asked for some further information in support of the business case.

The Group noted that the business case refers to some accommodation within the new facilities being shelled initially. The Group asked if you could expand on your initial response to comments on this. In particular, the Group would be grateful if you would share the activity projections that support the future need, and set out your projected timeline for bringing these areas into service. In addition, the Group suggested that the logic supporting the shelled accommodation should be made explicit in the final version of the business case.

If you would like to discuss the matter in more detail I would be happy to talk through them with you. Yvonne Summers (Yvonne.Summers@nhs.uk, [REDACTED]) would also be happy to discuss the service-related issues with you.

Yours sincerely

MIKE BAXTER

Deputy Director, Capital and Facilities

MINUTES OF THE CAPITAL INVESTMENT GROUP (CIG) HELD ON TUESDAY 7 OCTOBER AT 9.30AM, CONFERENCE ROOMS A AND B ST ANDREW'S HOUSE

Present: Steven Hanlon
Colin Wilson
Colin Proctor
Tracy Barschtschyk
Jim May
Chris Dodds

Apologies: Mike Baxter
Gillian McCallum
Carmel Sheriff
Marjorie Marshall
Yvonne Summers

	1.	APOLOGIES
	1.1	<p>The Chair, Steven Hanlon (in Mike Baxter's absence) introduced the meeting and apologies were noted.</p> <p>The minutes of the 26 August were taken as an accurate record of the meeting. It was noted that the planned meeting on 16 September had been cancelled.</p> <p>Action points from the previous meeting were as follows:</p> <p>4.1 – Mike Baxter to route PPE lessons learnt through SCIM channels.</p> <p>7.1 – Steven Hanlon is writing to NHS Lothian on remaining issues on the Royal Hospital for Sick Children and DCN - FBC and we are awaiting a response from Yvonne Summers on the Board response to shelled areas issues.</p> <p>8.1 – A useful response has been received from NHS Tayside on plans and assumptions relating to NNS Scotland – Pharmaceuticals Specials Service Project – OBC.</p> <p>10.1 – A letter was issued to NHS Forth Valley outlining concerns relating to the Stirling Care</p>

		<p>Village OBC and inviting the Board to a face to face meeting to discuss the case – This is still to take place.</p> <p>11.1 – Steven Hanlon will ensure that the NHS Grampian – Chalmers Hospital – PPE document is fully updated.</p> <p>12.1 – Tracy Barschtschyk advised that she has been in contact with Jim Lieper, NHS Fife and will keep us posted.</p> <p>An update on NHS Western Isles – St Brendan’s project was requested. Steven Hanlon advised that work was being done on this and that the project will be back for approval when all issues are resolved.</p>
	2.	GATEWAY REVIEW UPDATE – PAPER 43/14
ACTION POINT - TRACY BARSCHTSCHYK	2.1	<p>Tracy Barschtschyk updated the group as follows:</p> <p><u>Gartnavel General Outpatient Department – Gateway Review 2 – October 2014</u> (Mike Baxter being interviewed as part of Gateway process).</p> <p><u>Raigmore Hospital – Critical Infrastructure Upgrade</u> - Repeat GR2 – October 2014</p> <p><u>Modernisation and Redesign of Primary, Community and Social Care Services and Facilities for Alexandria</u> – GR5 (Benefits Realisation) – November 2014</p> <p>No response from Nick Kenton (SRO) on <u>Raigmore Critical Care and Ward Re-design programme</u>. Mike Baxter sent reminder on 13 August 2014.</p> <p><u>Victoria Hospital Kirkcaldy Tower Block</u> - Still in discussion with Jim Leiper (SRO) on alternative Independent Assurance Support. Tracy will update CIG at next meeting.</p> <p>To be re-visited in 2015:</p> <p>BfBC phase 3 Programme of Estates Upgrade Partnership Centre Bundle Project</p>

ACTION POINT – TRACY BARSCHTSCHYK		<i>Members suggested enquiring about further integration – lessons learned from early co-location during the Alexandria Gate 5 review – Tracy agreed to discuss this with Review Team members at the Planning Meeting prior to the Review.</i>
	3.	NHS Lothian – Royal Edinburgh Hospital Campus Redevelopment Phase 1 – Full Business Case
	3.1	<p>CIG members were content with case and with responses to CIG comments.</p> <p>The Board are to be asked to update the final document. It was noted that the Board's internal costs could have been presented more clearly and the risk register needs to be updated.</p> <p>The group were content to approve the project.</p>
	4.	NHS Greater Glasgow and Clyde – Expansion of Ambulatory Care Services – Gartnavel General Hospital – Initial Agreement
	4.1	<p>It was noted that the Board have tight timescales for the delivery of this project.</p> <p>Steven agreed that before approval was issued he would write to the Board asking for the IA to be updated in line with comments made, and for further detail on the 10-year plan for the Gartnavel site, the healthcare planning work currently underway, and contingency plans.</p> <p>It was noted that the OBC should consider the operational model of the existing services alongside the new facility, and consider plans for the site in more detail.</p>
	5.	BUSINESS CASE TIMETABLE
ACTION POINT – COLIN WILSON	5.1	<p>A general update is required.</p> <p><i>Colin Wilson will make a new round of contacts with the Boards.</i></p>
	6.	AOCB & DATE OF NEXT MEETING – 28 OCTOBER 2014
	6.1	There were no further business issues.

From: Summers Y (Yvonne)
Sent: 07 October 2014 12:20
To: Wilson C (Colin) (Health); Colin.proctor [REDACTED]
Cc: Baxter M (Mike) (Health); Hanlon S (Steven)
Subject: RE: NHS Lothian - Royal Hospital Sick Children & DCN - FBC

Colin,

On the basis of this response, I am content that the Board has taken a thorough approach to bed modelling and that the shelled space is a wise approach to future-proofing the design. To that extent, I'm happy to accept the response from the Board to this query.

However, I am by no means an expert in bed modelling or the appropriate assumptions around service model and occupancy levels. Can I check that these aspects have been considered as part of the design appraisal (by SFT or HFS)?

Regards
Yvonne

Yvonne Summers | Performance Management | Health Workforce and Performance Directorate | SAH | Edinburgh
EH1 3DG

Office: [REDACTED] | Mobile: [REDACTED]

* yvonne.summers@scotland.gsi.gov.uk

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From: Wilson C (Colin) (Health)
Sent: 03 October 2014 09:58
To: Colin [REDACTED]; Summers Y (Yvonne)
Cc: Baxter M (Mike) (Health); Hanlon S (Steven)
Subject: FW: NHS Lothian - Royal Hospital Sick Children & DCN - FBC

Colleagues,

Please find below Board response to outstanding issues with this project. Can you please let me know if you are content with the response.

Thanks

Colin

From: Baxter M (Mike) (Health)
Sent: 01 October 2014 09:11
To: Wilson C (Colin) (Health)
Cc: Hanlon S (Steven)
Subject: FW: NHS Lothian - Royal Hospital Sick Children & DCN - FBC

Colin

Response received from Lothian re shelled space. Can you forward to those asking the question (Colin Proctor and Yvonne Summers) to see if they are content please.

Kind Regards

Mike Baxter
Deputy Director (Capital and Facilities)
Directorate of Finance, eHealth and Pharmaceuticals
Scottish Government Health and Social Care Directorates
Tel [REDACTED]
Mob [REDACTED]

From: Sansbury, Jackie [<mailto:Jackie.Sansbury>] [REDACTED]
Sent: 01 October 2014 08:47
To: Baxter M (Mike) (Health)
Cc: Currie, Brian; Mackenzie, Janice
Subject: RE: NHS Lothian - Royal Hospital Sick Children & DCN - FBC

Dear Mike, Please find the attached response. I apologise for any delay in responding.

Capital Investment Group question:

The Group noted that the business case refers to some accommodation within the new facilities being shelled initially. The Group asked if you could expand on your initial response to comments on this. In particular, the Group would be grateful if you would share the activity projections that support the future need, and set out your projected timeline for bringing these areas into service. In addition, the Group suggested that the logic supporting the shelled accommodation should be made explicit in the final version of the business case.

NHSL response:

The activity projections for the modelling for RHSC and DCN beds, theatres and radiology modalities were included in the OBC (detailed in Appendix 8, attached again for ease of reference), although it should be noted that these were based on a 2016 opening date with all accommodation to be in use by 2021. This modelling is revisited annually to ensure that services are planned to meet demand, and when 2012/13 full year activity and population projections were applied, these showed inpatient and day case activity was on the previously stated trajectory.

The proposed shelled space includes:

- 5 RHSC inpatient beds
- 5 DCN inpatient beds
- 1 shelled MRI scanner

There has been further flexibility built into the building though:

- Paediatric day case beds sized and adjoining the medical inpatient beds.
- The structure of the clinical management suite would support it being changed into clinical accommodation further down the line if required

- The proposed model also allows for some contingency in that should neuroscience activity be ahead of projections the spinal inpatient and theatre activity could remain in RIE rather than be incorporated fully in the new build.

NHS Lothian's [Health Intelligence Team] are currently re-visiting this with 2013-14 activity. While the final model is not available yet, it is expected that, based on operational experience, the activity in paediatric haematology / oncology, adult neurosurgery, and MRI across all age groups will be in excess of previous modelling.

The increase in paediatric oncology/haematology is based on changes to individual patient regimes through national treatment protocols.

The anticipated changes in DCN are thought to be based on the impact of the appointment of additional neurosurgeons over the base when the modelling was completed.

The increase in MRI is based on an annual increase in MRI scanning in Lothian during 2013/14 of circa 13.6% per year with only 5% anticipated during the modelling.

It has been agreed that the annual modelling update will be shared with the SEAT Boards and NHS Dumfries and Galloway for a joined-up discussion about the service planning for RHSC and DCN, including any necessary changes to the phasing in of shelled beds and radiology.

The updated activity projections will be shared with SGHD when available.

If this is not sufficient, please let me know and we would be happy to attend a meeting and take the team through this if at all helpful.

Jackie

Jackie Sansbury

Head of Redesign and Commissioning

RHSC + DCN - Little France

NHS Lothian

56 Canaan Lane

Edinburgh

EH10 4SG

Tel: [REDACTED]

Mobile: [REDACTED]

Email: [jackie.sansbury@\[REDACTED\]](mailto:jackie.sansbury@[REDACTED])

From: Mike.Baxter@scotland.gsi.gov.uk [[mailto:Mike.Baxter@\[REDACTED\]](mailto:Mike.Baxter@[REDACTED])]

Sent: 29 September 2014 16:05

To: Currie, Brian

Cc: [Steven@\[REDACTED\]](mailto:Steven@[REDACTED]); [Yvonne.Summers@\[REDACTED\]](mailto:Yvonne.Summers@[REDACTED]); [Colin.Wilson2@\[REDACTED\]](mailto:Colin.Wilson2@[REDACTED]);

[Kerry.Alexander@\[REDACTED\]](mailto:Kerry.Alexander@[REDACTED])

Subject: RE: NHS Lothian - Royal Hospital Sick Children & DCN - FBC

Brian

Are you in a position to respond to the attached in order to conclude the FBC process?

Thanks in advance

Kind Regards

Mike Baxter

Deputy Director (Capital and Facilities)

Directorate of Finance, eHealth and Pharmaceuticals

Scottish Government Health and Social Care Directorates

Tel [redacted]
Mob [redacted]

From: Baxter M (Mike) (Health)
Sent: 17 September 2014 17:00
To: 'Currie, Brian ([brian.currie](#) [redacted])'
Cc: Steven Hanlon ([Steven.hanlon](#) [redacted]); Summers Y (Yvonne); Wilson C (Colin) (Health); 'Kerry Alexander ([Kerry.Alexander](#) [redacted])'
Subject: NHS Lothian - Royal Hospital Sick Children & DCN - FBC

Brian

Please find attached a letter with one follow up issue from CIG. This is the only outstanding issue in need of resolution. In parallel with the Board responding to the attached I will pursue funding conditions with SFT in order to bring this to a conclusion.

<< File: CIG - NHS Lothian - Royal Hospital for Sick Children - Full Business Case (FBC) - Response Letter - 17 September 2014.pdf >>

Kind Regards

Mike Baxter
Deputy Director (Capital and Facilities)
Directorate of Finance, eHealth and Pharmaceuticals
Scottish Government Health and Social Care Directorates
Tel [redacted]
Mob [redacted]

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Dh'fhaodadh gum bi teachdaireachd sam bith bho Riaghaltas na h-Alba air a chlàradh neo air a sgrùdadh airson dearbhadh gu bheil an siostam ag obair gu h-èifeachdach neo airson adhbhar laghail eile. Dh'fhaodadh nach eil beachdan anns a' phost-d seo co-ionann ri beachdan Riaghaltas na h-Alba.

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From: Allan, Lynn <lynn.allan [REDACTED]>
Sent: 27 October 2014 17:25
To: Hanlon S (Steven); Cosens, Sorrel
Cc: Pringle, Moira; Baxter M (Mike) (Health)
Subject: RE: NHS Lothian - Royal Hospital for Sick Children & DCN - FBC

Categories: Don't forget!

Hi Steven,

Brian will be responding regarding overall costs in due course but I thought it was worth dropping you a note to clarify the position with the petrol station.

The £550k in the FBC was for the purchase and site investigation work. This should remain in the approval letter. The confusion is due to a different £500k cap that relates to decontamination that is part of the NDP CAPEX.

Hope this helps.

Lynn Allan
Project Accountant
NHS Lothian
RHSC + DCN - Little France
56 Canaan Lane, EH10 4SG, Edinburgh

T: [REDACTED]
E: Lynn.Allan@nhs.uk [REDACTED]

From: Steven.Hanlon [REDACTED] [mailto:Steven.Hanlon [REDACTED]]
Sent: 27 October 2014 10:16
To: Cosens, Sorrel
Cc: Allan, Lynn; Pringle, Moira; Mike.Baxter [REDACTED]
Subject: FW: NHS Lothian - Royal Hospital for Sick Children & DCN - FBC

Hi Sorrel,

Just looking for an update on the below – are there any cost issues still outstanding on your end? If not, we will arrange for an approval letter to be issued.

Also, I understand that the petrol station works will no longer require enabling capital, as assumed in the FBC. Grateful if you could confirm this, and I'll ensure that the approval letter is adjusted appropriately.

Thanks,
Steven

From: Hanlon S (Steven)
Sent: 15 October 2014 14:33
To: Sorrel.Cosens [REDACTED]
Cc: Lynn Allan; Moira Pringle
Subject: RE: NHS Lothian - Royal Hospital for Sick Children & DCN - FBC

Hi Sorrel,

Colin passed me your message. Sorry not to have been in touch with you recently on this. We are ready to approve the project and have the letter and funding conditions drafted, so we're not waiting on anything from you and there aren't any queries outstanding.

I've held off getting the letter out because Kerry Alexander mentioned that there was a potential change to the construction costs of around £0.4-0.5m, as you worked with the preferred bidder. I'd been meaning to get in touch with you about it – can you shed any light on this?

Thanks,
Steven

From: Wilson C (Colin) (Health)
Sent: 15 October 2014 12:27
To: Hanlon S (Steven)
Subject: NHS Lothian - Royal Hospital for Sick Children & DCN - FBC

Steven,

Sorrell telephoned me this morning [REDACTED] looking for an update on this case. Is there anything I can tell her at this stage?

Thanks

Colin

COLIN WILSON | Capital and Facilities Policy Support Officer
Capital and Facilities
Directorate for Finance, eHealth and Pharmaceuticals

Address: St. Andrew's House | Basement Rear | Regent Road | Edinburgh | EH1 3DG
Tel: [REDACTED]
E-mail: [Colin.Wilson2@\[REDACTED\]](mailto:Colin.Wilson2@[REDACTED])

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Dh'fhaodadh gum bi teachdaireachd sam bith bho Riaghaltas na h-Alba air a chlàradh neo air a sgrùdadh airson dearbhadh gu bheil an siostam ag obair gu h-èifeachdach neo airson adhbhar laghail eile. Dh'fhaodadh nach eil beachdan anns a' phost-d seo co-ionann ri beachdan Riaghaltas na h-Alba.

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**MINUTES OF THE CAPITAL INVESTMENT GROUP MEETING, TUESDAY 25
NOVEMBER 2014 09.30AM, CONFERENCE ROOMS A AND B ST ANDREW'S
HOUSE**

Present: Mike Baxter
David Browning
Colin Proctor
Colin Wilson
Tracy Barschtschyk
Steven Hanlon
Reme Diaz

Apologies: Yvonne Summers
Carmel Sheriff
Marjorie Marshall
Robert Peterson
Gillian McCallum

	1.	APOLOGIES
	1.1	The Chair, Mike Baxter introduced the meeting and apologies were noted.
	2.	MINUTES OF THE LAST MEETING
	2.1	The minutes of the 28 October meeting were taken as an accurate record of the meeting
	3.	ACTION POINTS
ACTION POINT – COLIN WILSON/STEVEN HANLON/MIKE BAXTER	3.1	<p>The general meeting of Capital and Facilities staff on forthcoming major projects has been rolled over and will take place before the next meeting. Colin Wilson will arrange.</p> <p>Project updates were provided by the Chair as follows:</p> <p>NHS Lothian – Royal Hospital for Sick Children and DCN – FBC - this case is progressing with financial close expected by the end of January subject to any unexpected delays. The approval letter is still to go out but other issues have been dealt with.</p> <p>NHS Ayrshire & Arran – North Ayrshire Community</p>

		<p>Hospital – FBC - This case is progressing well.</p> <p>NHS Orkney – Balfour Hospital – The first day of competitive dialogue was 25 November.</p>
	4.	GATEWAY REVIEW UPDATE
ACTION POINT – TRACY BARSCHTSCHYK	4.1	<p>Tracy Barschtschyk updated the group as follows:</p> <p><u>Gartnavel Outpatient Department Project</u> – Gateway Review 2 (Delivery Strategy) held on 20-22 October 2014 (amber).</p> <p><u>Raigmore Hospital – Critical Infrastructure Upgrade</u> – Gateway Review 2 held on 20-22 October (A/G)</p> <p>Future Assurance Reviews:</p> <p><u>Modernisation and Redesign of Primary and Community Health Services for Alexandria</u> – Gateway Review 5 (Benefits Realisation) – 26-28 November 2014 – The project team have offered a presentation and walk round Vale Centre to members of CIG.</p> <p><u>Monklands Hospital – Theatre Configuration and Upgrade</u> – Gateway Review 3 (Investment Decision) – 2-4 December 2014</p> <p>Meeting (Independent Assurance Review) to be set up between Mike Baxter and Tracy Barschtschyk</p>
	5.	UPDATE – NHS GRAMPIAN DENBURN – REDESIGN AND MODERNISATION OF PRIMARY HEALTH AND CARE SERVICES – INITIAL AGREEMENT
	5.1	CIG members are now content with outstanding issues. The approval letter will be issued shortly.
	6.	UPDATE – NHS DUMFRIES AND GALLOWAY – WOMEN AND CHILDREN’S HUB
	6.1	The approval letter will be issued shortly.
	7.	UPDATE - NHS FORTH VALLEY – STIRLING CARE VILLAGE
	7.1	A meeting is shortly to take place to deal with outstanding issues.
	8.	UPDATE - NHS GRAMPIAN – WOMEN’S HOSPITAL AND CANCER CENTRE

	8.1	<p>The project team have now been mobilised – the project is expected to move forward in December. Engagement will take place with Scottish Futures Trust.</p> <p>Mike Baxter advised that he is awaiting a response regarding Gateway Review and the Gartnavel Outpatients - IA project. Carmel Sheriff also has an issue with the services element of this project to be resolved.</p>
	9.	NHS HIGHLAND – RAIGMORE HOSPITAL CRITICAL CARE CONSOLIDATION AND THEATRES REFURBISHMENT – OUTLINE BUSINESS CASE
	9.1	<p>Steven Hanlon outlined the case to the group. The Chair made the following observations:</p> <p>That the master plan is now ready in draft.</p> <p>It was pointed out that NHS Lanarkshire and Highland have been sharing knowledge.</p> <p>It was recommended that NHS Highland carry out a risk review. Project management also requires reviewing with HFS input required on this and that all Gateway Review recommendations are taken into account. The finance relating to the project will be looked at again, the sum requested against possible cost savings achievable through efficiency improvements.</p> <p>It was noted that an updated cost plan has been requested from the Board.</p> <p>Comments were also made regarding the proposed configuration of the theatre block which were to be fed back to the Board.</p> <p>The masterplan has been examined with risk identified as an important issue to be addressed</p>
	10.	BUSINESS CASE TIMETABLE
	10.1	<p>The timetable was reviewed by the group and a Boards update is underway. The group acknowledged that there will be 4 cases to review at the next meeting and that 2 PPE documents have been deferred to the January 2015 meeting.</p>
	11.	A.O.C.B AND DATE OF NEXT MEETING – 16 DECEMBER 2014
	11.1	<p>Outstanding issues on the cases discussed under items 5-8 will be resolved quickly.</p>

<p>ACTION POINT – STEVEN HANLON</p>		<p>It was recognised that Boards were sometimes unsure of project progress after CIG meetings and so in future, immediately following CIG meetings, Boards will be informed if there are any outstanding issues.</p>
<p>ACTION POINT – DAVID BROWNING</p>		<p>It was stressed that it is important that the Capital Investment Network meeting groups are aware of the importance of the Gateway Review process and as such, a meeting will be organised to discuss this issue.</p> <p>Mike Baxter (Chair) announced that the next meeting would be his last for a few months before moving to a new role and that in the interim David Browning would Chair the meetings.</p>

**MINUTES OF THE MEETING OF THE CAPITAL INVESTMENT GROUP (CIG)
HELD ON TUESDAY 16 DECEMBER 2014 AT 9.30 AM
CONFERENCE ROOMS C AND D, ST ANDREWS HOUSE**

Present: Mike Baxter (Chair)
Carmel Sheriff
Yvonne Summers
Colin Proctor (SFT)
Marjorie Marshall
Tracy Barschtschyk
David Browning (HFS)
Diane Campion
Mariane McGowan (Administration)
Julie White (NHS D&G)
Dennis O’Keeffe (NHS D&G)
Katy Lewis (NHS D&G)

Apologies: John Matheson
Christine McLaughlin
Steven Hanlon
Gillian McCallum
Colin Wilson
Robert Peterson

	1.	INTRODUCTIONS
	1.1	Mike Baxter welcomed all to the meeting and each members introduced themselves to the Group and colleagues from NHS Dumfries and Galloway
Action: Colin Wilson – to send out the presentation to CIG members	1.2	NHS Dumfries and Galloway attended the first half of the meeting to give a presentation on their new District General Hospital’s Full Business Case.
	1.3	Julie White introduced the presentation and spoke about the strategic and service context of the Full Business Case.
	1.4	Katy Lewis then went onto discuss Affordability and Cresswell.
	1.5	Dennis O’Keeffe talked about the Deliverability Risks.
	1.6	At the end of the presentation there was an Q&A session where NHS D&G clarified points on the FBC to CIG members.

	2.	MINUTES FROM LAST MEETING – 5 NOVEMBER
	2.1	The minutes of 25 November were taken as a true record of the meeting.
	3.	ACTION POINTS FROM THE PREVIOUS MEETING - PAPER
	3.1	The Chair gave an oral update on the follow up to the previous meeting and confirmed he would be circulating a briefing note before the end of December.
	3.2	Action Point 4.1 Mike and Tracy on 22 December.
Action: Colin Wilson	3.3	Colleagues have still to come back on the Board responses.
	4.	NHS DUMFRIES AND GALLOWAY – NEW DISTRICT GENERAL HOSPITAL – FBC – PAPER 53/14
	4.1	Mike Baxter informed the Group that any outstanding comments should be sent in asap to be fed back to the Board.
	5.	NHS Lothian – Partnership Centre Bundle – Full Business Case – Paper 54/14
	5.1	Mike Baxter informed the Group that any outstanding comments should be sent in asap to be fed back to the Board.
	6.	SCOTTISH AMBULANCE SERVICE – AMBULANCE TELEHEALTH PHASE 1 – FULL BUSINESS CASE – PAPERS 55/14
	6.1	Mike Baxter informed the Group that any outstanding comments should be sent in asap to be fed back to the Board.
	7.	NHS GRAMPIAN – CARBON ENERGY FUND – OUTLINE BUSINESS CASE – PAPER 56/14
	7.1	Mike Baxter informed the Group that any outstanding comments should be sent in asap to be fed back to the Board.

	8.	BUSINESS CASE TIMETABLE – PAPER 57/14
Action – Colin Wilson	8.1	The business case timetable is being updated by Colin Wilson at the moment and will be taken at the next CIG meeting.
	9.	ANY OTHER BUSINESS
	9.1	Mike Baxter thanked the Group for the support they had given him and introduced David Browning as the new Chair of CIG.
	10.	DATE OF NEXT MEETING
	10.1	The next meeting will be held on Tuesday 13 January in Conference Rooms A and B, St Andrews House.

From: Browning David (NATIONAL SERVICES SCOTLAND) [REDACTED]
Sent: 29 January 2015 14:46
To: Morrison A (Alan)
Cc: McGowan M (Mariane)
Subject: Re: Sick Kids approval

Follow Up Flag: Follow up
Flag Status: Completed

Categories: Reply/Action

Alan

Yes, it's the November letter.

Re the figures, I believe the Board is required to present the figures in the final model which SFT endorse through their stage 2 approval.

Mariane, could you please check what letter was sent to NHS Lothian following the CIG consideration of FBC. This was before my time but believe FBC was approved pending SFT stage 2 approval.

Alan- reason for need to check is that the letter from Paul on FBC Blood Transfusion seems to have CIG and stage 2 approval at same time?

Best Wishes

D

David Browning

Acting Deputy Director (Capital and Facilities)

Directorate of Finance, eHealth and Analytics

Scottish Government Health and Social Care Directorates

St. Andrews House

Edinburgh

EH1 3DG

Tel [REDACTED]

Mob [REDACTED]

On 29 Jan 2015, at 14:13, "[Alan.Morrison \[REDACTED\]](#)" <[Alan.Morrison \[REDACTED\]](#)> wrote:

David

I think agreeing the position outlined by Moira would be fine. In terms of preparing the draft letter, is that the same letter you refer to in the previous sentence (and the one Kerry sent last night). I think it would be good to get that finalised, but is it us or SFT who are responsible for the numbers?

Alan

Alan Morrison
Health Finance
Scottish Government Health and Social Care Directorates
[REDACTED]

From: Browning David (NATIONAL SERVICES SCOTLAND) [REDACTED]
Sent: 29 January 2015 14:04
To: Morrison A (Alan)
Cc: McGowan M (Mariane)
Subject: Re: Sick Kids approval

Alan

I agree the commercial position on both projects remains incomplete although RHSC appears almost there.

As we have the commercial meeting with RHSC tomorrow we will get clarity on when the model will likely be run. SFT say they will review the November letter for accuracy.

Moira has written seeking conformation the funding is agreed. Can we agree this and prepare draft letter?

I am working at home. My land line is 01555 665628. Mobile signal v poor here. Happy to discuss.

Best Wishes

David

David Browning

Acting Deputy Director (Capital and Facilities)

Directorate of Finance, eHealth and Analytics

Scottish Government Health and Social Care Directorates

St. Andrews House

Edinburgh

EH1 3DG

Tel [REDACTED]

Mob [REDACTED]

On 29 Jan 2015, at 13:18, "[Mariane.McGowan](#) [REDACTED]" <[Mariane.McGowan](#) [REDACTED]> wrote:

David

For your attention.

Mariane McGowan/Personal Secretary to David Browning

Capital and Facilities

Area BR

St Andrew's House

Edinburgh

EH1 3DG

 tel: [REDACTED]

 fax: [REDACTED]

 email: Mariane.mcgowan [REDACTED]

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<image007.jpg><image008.jpg> <image009.jpg>

From: Morrison A (Alan)
Sent: 29 January 2015 11:01
To: Browning D (David)
Subject: RE: Sick Kids approval

David

I am a bit unclear as to what needs to happen in what order.

Kerry says:

I attach the last draft of the funding conditions letter that was in circulation with Steven and Mike (from last November) and the associated exchange of emails for the Sick Kids NPD. This letter is to be attached to the FBC approval for RHSC/DCN when the commercial position has settled and funding of that agreed and we have a draft funding template from the bidder's model.

Does this mean that they are reliant on Lothian providing them with the draft funding template, because the sense I got from our meeting with Moira and Ian was that they were waiting on a number of issues to be resolved before they ran the model. I have attached the two documents we sent NSS to conclude the SNBTS business case and I assume SFT prepare both letters, but what needs to happen for SFT to produce them?

I am just a bit concerned that we are missing a trick and causing a delay (though having met SFT and Lothian this week, I didn't get the impression that either of them were waiting on us).

Regards

Alan

Alan Morrison
Health Finance
Scottish Government Health and Social Care Directorates
[REDACTED]

From: Kerry Alexander [[mailto:Kerry.Alexander@\[REDACTED\]](mailto:Kerry.Alexander@[REDACTED])]
Sent: 28 January 2015 22:29
To: Morrison A (Alan)

Cc: Browning D (David); Donna Stevenson
Subject: FW: Sick Kids approval

Alan

As referenced when John Hope and I met with you last week I attach the last draft of the funding conditions letter that was in circulation with Steven and Mike (from last November) and the associated exchange of emails for the Sick Kids NPD. This letter is to be attached to the FBC approval for RHSC/DCN when the commercial position has settled and funding of that agreed and we have a draft funding template from the bidder's model. I am not aware if a settled commercial position has been reached and will see if I can find out this week so that we can access a copy of the financial model and check the content of the letter is still current.

I had also asked you whether NHS Lothian had asked for signature of the EFDA? You noted that you were discussing EFDA with Dumfries but I'm not sure if this is being processed for NHS Lothian as well? Perhaps you could confirm?

Based on the format of the letter above, I can provide a suggested draft for DGRI once we have a bit more information on the commercial position.

Thanks and regards
 Kerry

Kerry Alexander
 NPD Programme Director
 Mobile: [REDACTED]
Scottish Futures Trust

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From: Steven [REDACTED]
 [mailto:Steven.Hanlon@scottishfutures.com]

Sent: 17 November 2014 14:12

To: Kerry Alexander; Mike.Baxter [REDACTED]

Cc: Donna Stevenson

Subject: RE: Sick Kids approval

Thanks, latest version attached.

- Updated as discussed below
- Now on an SG headed template
- Para.2 updated to assume that the funding schedule will be attached.

I'll get this issued as soon as the funding schedule is in.

Thanks,
 Steven

From: Kerry Alexander [mailto:Kerry.Alexander@scottishfutures.com]
Sent: 16 November 2014 20:33
To: Baxter M (Mike) (Health)

Cc: Hanlon S (Steven); Donna Stevenson
Subject: Re: Sick Kids approval

Steven/Mike

As Mike notes, extra capex should be referenced. First bullet is perhaps the place to note the additional capex of £2.1m to be supported. I wouldn't necessarily put in total capex as the support is translated into revenue support through accompanying appendix.

I have asked Iain Graham for a copy of the financial model which is based on the revised capex number in it so that you can attach the revenue support template - Iain is aware this is linked to FBC approval. I have not had a response from the Board and will let you know when this comes through/send template.

There is a bullet that says funding at risk if close does not happen by 30 November. You may wish to consider if this wording is appropriate for the current status of the deal. Perhaps not unreasonable to change to 31 January 2015?

Regards
Kerry

Sent from my iPad

On 14 Nov 2014, at 09:05, "Mike.Baxter [REDACTED]"
<[Mike.Baxter@\[REDACTED\]](mailto:Mike.Baxter@[REDACTED])> wrote:

Steven

The additional £2,116,232 needs to be included in the supported cap ex figure

Kind Regards

Mike Baxter
Deputy Director (Capital and Facilities)
Directorate of Finance, eHealth and Pharmaceuticals
Scottish Government Health and Social Care
Directorates
Tel [REDACTED]
Mob [REDACTED]

From: Hanlon S (Steven)
Sent: 13 November 2014 15:59
To: Kerry Alexander ([Kerry.Alexander@\[REDACTED\]](mailto:Kerry.Alexander@[REDACTED]));
Baxter M (Mike) (Health)
Subject: RE: Sick Kids approval

Sorry, with the attachment this time.

From: Hanlon S (Steven)
Sent: 13 November 2014 15:58
To: Kerry Alexander ([Kerry.Alexander](#) [redacted]);
Baxter M (Mike) (Health)
Subject: Sick Kids approval

Kerry, Mike,

Looks like we are about ready to do the approval letter for Sick Kids. I attach a version with the changes I know about:

- The specification of the elements of the enabling works added in.
- The £550k enabling capital for the petrol station purchase and site investigation has been reinstated within the Enabling para, as the Board have clarified that this is separate from the £500k works on the site which will be funded by revenue.
- Duplicate reference to the £500k of works on the petrol station site in the bullets straddling pages 1 and 2 removed.

Can you:

- review and confirm if you are happy with this version of the letter?
- consider if the recent agreement to support £2.1m additional capex needs to be reflected in the letter?

Thanks,
Steven

Steven Hanlon
Capital Finance and Policy Manager
Capital and Facilities / External Financial Performance
Directorate for Health Finance, eHealth and Pharmaceuticals
The Scottish Government
Tel: 0131 244 2139
Email: steven.hanlon [redacted]
Floor BR, St Andrews House, Edinburgh

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Dh'fhaodadh gum bi teachdaireachd sam bith bho Riaghaltas na h-Alba air a chlàradh neo air a sgrùdadh airson dearbhadh gu bheil an siostam ag obair gu h-èifeachdach neo airson adhbhar laghail eile. Dh'fhaodadh nach eil beachdan anns a' phost-d seo co-ionann ri beachdan Riaghaltas na h-Alba.

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Director-General Health & Social Care and
Chief Executive NHSScotland
Paul Gray



T: [REDACTED]
E: [REDACTED]

Tim Davison
NHS Lothian
Waverley Gate
2-4 Waterloo Place
Edinburgh
EH1 3EG



10 February 2015

Dear Tim

NHS Lothian (the 'Board')
Royal Hospital for Sick Children and Department of Clinical Neuroscience (the 'Project')

I am writing to confirm that the Scottish Government Health and Social Care Directorate's Capital Investment Group has considered the Full Business Case for the Project submitted by the Board on 21 August 2014 and has agreed an award of revenue funding support for the Project. We will separately confirm the requirements for the Board to ensure satisfactory conclusion of the Pre Financial Close Key Stage Review.

I draw your attention to the requirements contained in SCIM Guidance to make business cases, addendums and contracts publicly available (for further information please refer to http://www.scim.scot.nhs.uk/Approvals/Pub_BC_C.htm). Specifically, in order to comply with the requirement to place these documents with the Scottish Parliament Library (SPICe), I would be grateful if you would forward (to Colin Wilson at Capital and Facilities Division, Basement Rear, St Andrew's House, Regent Road, Edinburgh, EH1 3DG and electronically to [Colin.Wilson@\[REDACTED\]](mailto:Colin.Wilson@[REDACTED])) a public version of the FBC within one month of receiving this approval letter and a public version of the FBC addendum and contract within one month of financial close.

I would ask that if any publicity is planned regarding the approval of the FBC and/or financial close, that the Board liaise with SG Communications colleagues regarding handling. If you have any queries regarding handling please contact Tim Jays in our Communications team ([tim.jays@\[REDACTED\]](mailto:tim.jays@[REDACTED])).

If you have any issues about the above please contact David Browning on [REDACTED] or e-mail [david.browning@\[REDACTED\]](mailto:david.browning@[REDACTED]).

Yours sincerely

[REDACTED]

Paul Gray

From: Morrison A (Alan)
Sent: 12 February 2015 14:28
To: Davison (Mr Tim (chief.executive [REDACTED]))
Cc: Goldsmith (Susan; Graham, Iain; Pringle, Moira; Brian Currie (brian.currie [REDACTED])); Matheson J (John); McLaughlin C (Christine); Browning D (David); Kerry Alexander; Donna.stevenson [REDACTED]; Peter Reekie (Peter.Reekie [REDACTED])
Subject: Sick Kids/DCN
Attachments: NHS Lothian - Revenue Funding Confirmation letter.docx
Categories: For info

Tim

One final letter in relation to this project, please find attached the revenue funding support letter signed by John Matheson, Director of Finance, eHealth and Analytics.

Regards

Alan

Alan Morrison
Health Finance
Scottish Government Health and Social Care Directorates
[REDACTED]

T: [REDACTED]
E: [REDACTED]

Tim Davison
NHS Lothian
Waverley Gate
2-4 Waterloo Place
Edinburgh
EH1 3EG



February 2015

Dear Tim

NHS Lothian (the 'Board')
Royal Hospital for Sick Children and Department of Clinical Neuroscience (the 'Project')

Previously I have written to you confirming that the Scottish Government Health and Social Care Directorate's Capital Investment Group has considered the Full Business Case for the Project submitted by the Board on 21 August 2014 and has agreed an award of revenue funding support for the Project. I now include further details regarding the revenue funding arrangements for the project.

The level of revenue funding support has been calculated by Scottish Futures Trust ('SFT') on our behalf, on the basis noted below, and is attached as a schedule (see Annex A) to this letter (the 'Revenue Support Schedule') detailing the level of support on an year by year basis (**'Revenue Funding Support'**) based on the model named 'RHSC DCN_Financial Model_0302015.xls' ('the Financial Model'). The Revenue Funding Support is calculated on the basis of the principles contained within the guidance letter issued by the then Director General for Health and Social Care to NHS Boards on 22 March 2011 and the letter issued to you on or about the time of approval of the outline business case confirming the principles of funding support as applied to your project (the 'Funding Letter') and includes provision for the issues noted below.

The Scottish Government will take the risk of movements in the base cost of senior funds to be assumed in the Revenue Support Schedule, up to the point of financial close. The Revenue Funding Support will be re-calculated at the point of financial close using the same financial model adjusted only to reflect (i) the base cost of senior funds rate at which the Project reaches financial close and (ii) any other changes that have been expressly approved by the SFT on behalf of the Scottish Government. All other inputs to the financial model will remain unchanged. As previously indicated, the base cost of senior funds rate proposed at financial close will be subject to SFT approval (on behalf of the Scottish Government). An amended Revenue Support Schedule, detailing the Revenue Funding Support recalculated to reflect the base cost of senior funds at the point of financial close and any other changes that have been approved by SFT, will be issued to you at financial close.

The issues referred to above in relation to the calculation of the Revenue Funding Support and consistent with the Key Stage Reviews and the Funding Letter, are that:

- the relevant capital amount for affordability purposes is the Preferred Bidder's final construction sum of £150.014 million (sourced from the Financial Model). Scottish Government anticipates no increase in the revenue funded capital amount.
- the contribution of the University of Edinburgh and any contributions from charities are to be finalised: any contributions towards the final construction sum of £150.014 million (other than relating to ongoing running costs) which are receivable and which relate to the scope of the project as indicated at 1.1.4 of the OBC Funding Letter will be used to reduce the level of Scottish Government's support.

Enabling Works

The Scottish Government shall provide capital funding support for enabling works and for equipment not included within the NPD Project Agreement; this forms part of the total contractual value which is capped at £80.083 million.

Any additional enabling works over and above that mentioned in the above sum will be met by NHS Lothian from within its Capital Resource Limit. This is the Scottish Government's maximum exposure and is based on the full scope of equipment contained in the Outline Business Case which excluded any assumed support via donations. Any support via donations for equipment included within the scope of the Outline Business Case will reduce the contribution made by Scottish Government in this regard.

In accordance with SCIM Guidance, an FBC addendum should be submitted to SGHSCD outlining key movements (including movements in the Revenue Funding Support as referred to in paragraph 2 above) between the date of this FBC approval and financial close. The final funding to be provided by Scottish Government will be confirmed following receipt of a Full Business Case Addendum and this will reflect the Revenue Funding Support schedule as calculated at financial close.

The Revenue Funding Support will be further adjusted as follows:

- to reflect amounts due and payable by the Board under the NPD contract in relation to the cost of the Operational Insurances;
- where there is delay in achieving the Actual Completion Date by the Completion Date such that the Annual Service Payment due and payable under the NPD contract in any financial year is reduced, there will be a corresponding reduction in the Funding Support for the financial year(s) affected;
- to reflect any change in the recoverability or rate of VAT by the Board;

An amended schedule to this letter will be issued to the Board to confirm any such adjustment(s) to the Revenue Funding Support.

The Revenue Support Schedule will detail the annual amounts of Revenue Funding Support for the Annual Service Payments. A specific Revenue Resource Limit allocation will be made to the Board in respect of the share of the Annual Service Payment falling due to the Scottish Government. This payment will be reviewed annually in accordance with the contract terms to reflect the inflationary impact on those elements of the Annual Service Payment falling due to the Scottish Government.

In preparing their annual financial plans Boards should explicitly state the funding support due in respect of NPD/ hub DBFM projects, including those non cash IFRS adjustments due such as balance sheet additions, depreciation and any impairments due.

Funds will, however, be provided to the Board on a monthly basis, the timing of which will be agreed with the Board as part of its cash requirement reported through Financial Performance Returns to match the timing of the Board's monthly service payment obligations under the NPD contract.

The following conditions apply to this award of Revenue Funding Support:

- As previously indicated, any Surpluses and Refinancing Gains received by the Board in terms of the NPD contract are to be accounted to the Scottish Government Health and

Social Care Directorate ('**SGHSCD**'). The Board must notify the SGHSCD as soon as it becomes aware of its entitlement to any Surpluses or Refinancing Gains and an appropriate mechanism for these to be accounted to the SGHSCD will be determined at the time. The Board must not agree a refinancing proposal under the NPD contract without the prior approval of SGHSCD.

- The Board is required to put in place procedures for the effective management and monitoring of the NPD contract during both the construction and operational periods. The Board must continue to co-operate with the SGHSCD and SFT throughout the Project (including in relation to any initiatives for collaborative contract management), keep SGHSCD and SFT informed of progress and developments on the Project and provide to SGHSCD and/or SFT, promptly on request, such information as they may from time to time request in relation to the Project, its progress and performance of obligations under the NPD contract.
- All funds must only be used for the purposes for which they are provided. SGHSCD has the right to audit the Board's documentation in order to satisfy itself that this is the case and the Board undertakes that it will provide such assistance, and access to information and personnel, as SGHSCD reasonably requires to enable SGHSCD to do so.

ESA 10

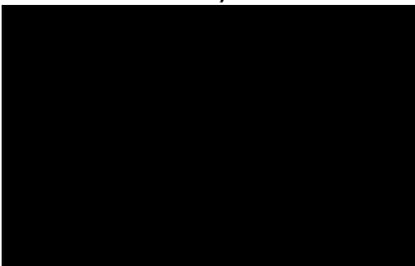
Following recent updates to relevant Eurostat technical guidance on National Statistical Accounts (the European System of Accounts – ESA 10), applied in September 2014, the Deputy First Minister recently lodged a [Parliamentary Question](#) which provided an update on the non-profit distributing (NPD) pipeline of infrastructure investment. In relation to your specific project, The Deputy First Minister said:

'I have considered the potential implications for projects that are due to reach financial close shortly. In relation to NPD projects – the Royal Hospital for Sick Children in Edinburgh and the Dumfries and Galloway Royal Infirmary – the government intends to take these projects to financial close as soon as possible, while making some appropriate contractual adjustments in consultation with partners.'

I acknowledge that the project is proceeding to Financial Close having adopted the contractual adjustments that have been recommended by Scottish Futures Trust in conjunction with Scottish Government.

I hope this provides an appropriate level of assurance that the Government remain committed to this project. If you have any queries regarding the above please contact Alan Morrison on [REDACTED] or e-mail [alan.morrison@\[REDACTED\]](mailto:alan.morrison@[REDACTED]).

Yours sincerely



JOHN MATHESON
Director of Finance, eHealth and Analytics

SCHEDULE : Revenue Funding Support at Full Business Case approval						
NHS Lothian						
Royal Hospital for Sick Children and Department for Clinical Neurosciences						
Calculation linked to financial model: RHSC DCN_Financial Model_0302015.xls						
A	B	C	D = B+C	E	F = D+E	
Year ending	Nominal Authority Contribution	SGHSCD Non-indexing Annual Service Payment	SGHSCD Indexing Annual Service Payment (nominal)	Total support for Annual Service Payment before Operational Insurances (nominal)	Estimated Operational Insurances (nominal)	Total Estimated Support
31 March 2016	-	-	-	-	-	-
31 March 2017	-	-	-	-	-	-
31 March 2018	1,632	1,498	8,444	9,942	149	10,091
31 March 2019	2,224	2,053	11,258	13,312	153	13,465
31 March 2020	2,280	2,105	11,258	13,363	157	13,520
31 March 2021	2,337	2,157	11,258	13,416	161	13,577
31 March 2022	2,395	2,211	11,258	13,470	165	13,635
31 March 2023	2,455	2,266	11,258	13,525	169	13,694
31 March 2024	2,517	2,323	11,258	13,581	173	13,755
31 March 2025	2,580	2,381	11,258	13,640	178	13,817
31 March 2026	2,644	2,441	11,258	13,699	182	13,881
31 March 2027	2,710	2,502	11,258	13,760	187	13,947
31 March 2028	2,778	2,564	11,258	13,823	191	14,014
31 March 2029	2,847	2,628	11,258	13,887	196	14,083
31 March 2030	2,919	2,694	11,258	13,952	201	14,153
31 March 2031	2,992	2,761	11,258	14,020	206	14,226
31 March 2032	3,066	2,830	11,258	14,089	211	14,300
31 March 2033	3,143	2,901	11,258	14,160	216	14,376
31 March 2034	3,222	2,974	11,258	14,232	222	14,454
31 March 2035	3,302	3,048	11,258	14,306	227	14,534
31 March 2036	3,385	3,124	11,258	14,383	233	14,616
31 March 2037	3,469	3,202	11,258	14,461	239	14,700
31 March 2038	3,556	3,282	11,258	14,541	245	14,786
31 March 2039	3,645	3,365	11,258	14,623	251	14,874
31 March 2040	3,736	3,449	11,258	14,707	257	14,964
31 March 2041	3,829	3,535	11,258	14,793	264	15,057
31 March 2042	3,925	3,623	11,258	14,882	270	15,152
31 March 2043	998	955	2,843	3,798	-	3,798

Notes

- All stated amounts are in £'000's and exclusive of VAT.
- The SGHSCD Non Indexing element is fixed at Financial Close and stated above
- For Board/SG budgeting purposes the SGHSCD Indexing Annual Service Payment is calculated once the ASP has been calculated by reference to the payment mechanism. The SGHSCD Indexing Annual Payment equals ASP less the SGHSCD Non Indexing ASP less the nominal authority contribution for hard FM and 50% lifecycle
- The calculation of these elements is illustrated in tab "ASP Split" of the Financial Model
The nominal authority contribution is uplifted annually in accordance with RPI.
- Nominal amounts in the Financial Close model assume annual RPI at 2.5% with a base date of 12 February 2015 and first uplift on 1 April 2015. Operational Insurances stated are estimates. Actual payments will be calculated and charged in accordance with the contract and funded by Scottish Government.

**MINUTES OF THE CAPITAL INVESTMENT GROUP (CIG) HELD ON TUESDAY
28 APRIL 2015 AT 09.00 CONFERENCE ROOMS A AND B, ST ANDREWS
HOUSE**

Present: David Browning (DB)
Steven Hanlon (SH)
Colin Proctor (CP)
Yvonne Summers (YS)
Tracy Barschtschyk (TB)
Marjorie Marshall (MM)
Colin Wilson (CW)
Paul Mortimer (PM)
Iain Graham (IG)

Apologies: Barbara Crowe
Christine McLaughlin
Lea Mann
John Mathieson
Carmel Sheriff (CS)
Gillian McCallum

	1.	INTRODUCTIONS / APOLOGIES
	1.1	DB welcomed all to the meeting and apologies were noted.
	2.	MINUTES FROM THE LAST MEETING – 7 APRIL 2015
	2.1	Apart from a typo in 3.1 (5.1), no closed bracket, the minutes of 7 April were taken as a true record of the meeting.
	3.	ACTION POINTS FROM THE PREVIOUS MEETING
	3.1	(3.1(7.1)) CP and YS are organising a meeting with NHS Grampian regarding the use of / improvement to the Aberdeen Emergency Care PPE to produce an exemplar report for use within the SCIM. (7.1) SH advised that the NHSS Surplus Site Disposals Plan will be sent shortly to YS and CS. Other issues discussed at this point in the agenda: NHS Greater Glasgow and Clyde - Woodside and Gorbals Health Centres – Approval letters have now been issued subject to some issues being resolved.

		<p>A response is still awaited from NHS Highland on the Argyle and Bute Mental Health OBC and its likely submission date to CIG.</p> <p>The Dumfries and Galloway addendum is still being followed up.</p> <p>It has now been notified that following the Buchan review, NHS Highland have specified that 7 ultra clean theatres are required as part of the Raigmore hospital Critical Care and Theatre OBC. The group considered whether CIG should further review this but agreed to send out a recommendation to go along with this number.</p> <p>NHS Fife – Stratheden Hospital IPCU – FBC is now ready for approval. YS advised that site issues had been raised and that the mental health strategy has been updated. The original proposal to retain 2 sites has now been amended to 3 including retention of the remainder of the Stratheden site.</p>
	4.	CIG PROGRAMME MANAGEMENT UPDATE
ACTION - ALL	4.1	SH circulated the new tracker document and asked that if colleagues have any comments on it to route these to him. This document will be looked at in more detail at the next meeting. A suggestion was raised that a box could be added to show method of funding.
	5.	NHS Lothian – Royal Hospital for Sick Children and Department of Clinical Neurosciences – FBC Addendum
	5.1	This case was brought to this meeting for review and noting. It was noted that there had been a change in the finance costs showing a saving of £75 million over the period of the contract. It was agreed that the final version of the document should reflect this. A finance update was provided by SH.
	6.	BUSINESS CASE TIMETABLE
	6.1	CW provided a brief update to the group.
	7.	A.O.C.B AND DATE OF NEXT MEETING
	7.1	It was suggested that an integrated approach is

		<p>required with the PAMS / LDPs and that Performance Management would like fed into what is being spoken about at PAMS meetings.</p> <p>Date of next meeting:</p> <p>19 May – 09.30, SAH Conference rooms A and B</p>
	8/9/10.	PRESENTATIONS
		<p>The standard meeting was followed by 3 presentations given by PM from NSS:</p> <ol style="list-style-type: none"> 1. NHSScotland Assets and Facilities 2. Update on SCIM review 3. VFA Capital Planning Tool <p>Key thoughts raised by the group were as follows:</p> <ol style="list-style-type: none"> 1. The Strategic Fit – what are the criteria and who sets them? 2. Some of the group thought that prioritisation was important – Is a prioritisation tool required? This question had previously been raised by Craig Marriot (NHS Dumfries and Galloway). 3. Should there be a scoring process? 4. Would both a CIG panel / Boards be required in scoring? 5. Would cases be scored at the Strategic Assessment stage? 6. Who would review the Strategic Assessment / scores? 7. Is the SCIM review timeline on target and how will the completed document be launched and who could possibly pilot it? 8. The SCIM Review could be included within the Capital Investment Network meeting.

Meeting Title: PROJECT STEERING BOARD

Date/Time: Friday 22 August 2014, 12.30-14.00

Location: MacKinlay Room, 56 Canaan Lane

Attendees:

Susan Goldsmith	Director of Finance + Project Sponsor – NHSL (Chair)
George Walker	Non Executive Director – NHSL
Peter Reekie	Director, Finance and Structures – SFT
Mike Baxter	Deputy Director (Capital + Facilities) – SGHD
Brian Currie	Project Director – NHSL
Iain Graham	Director of Capital Planning and Projects – NHSL
Jackie Sansbury	Head of Commissioning – NHSL
Sorrel Cosens	Project Manager – NHSL
Fiona Mitchell	Associate Divisional Medical Director – Women, Children and DCN Management Services - NHSL
Chris Bowring	Director of Finance – NHS Fife; SEAT representative
David Ridd	Communications Manager – NHSL

Apologies:

Robert Wilson	Non Executive Director – NHSL
Jacque Campbell	General Manager – Head and Neck
Moirra Pringle	Head of Strategic Financial Management – NHSL
Janice MacKenzie	Clinical Project Director – NHSL
Tracy Miller	Partnership Representative – NHSL

1.	Introductions and apologies	
	<p>SG apologised for the delay to starting the meeting, due to an important discussion on programme with IHSL running over.</p> <p>The apologies listed above were noted, and it was agreed to propose to D Farquharson that E Doyle would be invited to join the Steering Board. A DCN clinical representative would also be sought.</p>	SC
2.	Previous Action Notes from 20 June 2014	
	<p>The notes were approved as an accurate record.</p> <p><u>FBC</u> SG confirmed that the FBC had been approved by F&RC then NHSL Board for submission to SGHSCD CIG. The team presented the project to CIG on 05/08/14 and the FBC will be considered at their next meeting on 26/08/14.</p> <p>It was noted that F&RC on 27/08/14 will require an update on the programme. PR has also been invited to attend this meeting to discuss the NPD payment mechanism and financial close.</p> <p><u>Commissioning roles recruitment update</u> JKS confirmed that Ashley Hull has been appointed as commissioning manager for theatres and critical care and will start at the beginning of September.</p> <p>The post previously filled by J Steers has been split to allocate one session a week each to four DCN clinicians with the following speciality interests:</p>	

	<p>Mike Robson – Theatres and anaesthetics Colin Mumford – Neurology Drahoslav Sokol – Neurosurgery Andreas Demetriades – Neurosurgery</p> <p>Orientation for this team will begin in September.</p> <p><u>University accommodation</u> SG advised that she had responded to the University of Edinburgh letter expressing their concerns about site management, but had not received a response to date.</p> <p><u>Charity contributions update</u> BC confirmed that the Edinburgh and Lothians Health Foundation and the Sick Kids Friends Foundation had pledged £2m and £2.9m respectively. The formal agreements for these donations are being developed with the charities and the support of CLO. A meeting with all charities will take place on 10/09/14 to discuss terms of engagement, communications etc.</p>	
3.	<p>Project Dashboard and Programme</p> <p>SG noted that a Special Steering Board Meeting with representatives of IHSL immediately prior to this meeting had agreed to the revised programme showing eight weeks slippage to financial close. BC reported that IHSL had been reluctant to acknowledge the slippage when NHSL had felt it was obvious that the programme was unachievable for over a month, and that NHSL had to propose a revised programme in order for the preferred bidder to engage in discussions. An updated programme was tabled and agreed at the meeting and is attached for circulation with these minutes.</p> <p>GW asked if members felt the Steering Board meeting frequency was sufficient at present as it was unfortunate that the Project, when reporting to both F&RC and the NHSL Board in the past month, did not emphasise risks in relation to production of deliverables for financial close and any early warning of programme slippage. SG acknowledged that it was unfortunate that the July Steering Board had had to be cancelled due to unavailability of attendees. BC reminded all present that the July PSB Executive Summary circulated highlighted risks to financial close as interface, PCP's (technical documentation), design sign off and legal. BC advised the meeting that at the F&RC on 09/07/14 the Committee were advised under the discussion of key issues that work was progressing to Financial Close with conclusion of the contract dependent on completion of the Project Agreement and supporting information.</p> <p>The Steering Board agreed that close management of progress from now until the 27 November date would be required, and a fortnightly PSB Commercial Sub-Group meeting with IHSL was proposed. It was agreed that it would be necessary to delegate decision-making on some commercial issues to this sub-group, to consist of SG, GW, PR, MB, BC and IG in order to progress to financial close. Dates to be co-ordinated, with conference calls to be considered in place of physical attendance.</p> <p>BC spoke to the other blockages on the executive summary of the dashboard report.</p> <p>In respect of the ongoing payment mechanism discussions, CB asked where the standard form allowed room for negotiation. PR noted that the calibration of thresholds was project specific and this is what is being discussed.</p> <p>There have been delays in the production of technical information to a standard satisfactory to the Board, and NHSL sign-off of technical information (Project Co's proposals, design and operational functionality) is required for funders to be</p>	BC/SC

	<p>comfortable with the level of risk to their investment. BC reported that the complexity of this information and the resulting delays was a key contributing factor in the programme delay. Both IHSL and the Project Team are working hard to resolve this, which now requires to be completed by 06/10/14 and progress will be reported at the next Steering Board (26/09/14).</p> <p>BC reported that the team had met with resistance from Consort in the matter of progressing clinical enabling works in a meeting earlier that day; pre-tender costs were higher than previously intimated and discussion was tense, which gave cause for concern with the interface proposals due to be issued later that day. It was agreed to increase the risk status of the clinical enabling works to red.</p> <p>Delays in the development of necessary interface proposals by IHSL is the key reason for the programme slippage and is on the critical path for the revised financial close date. IG noted that Consort had not been available for Board to Board level interaction between NHSL and Consort recently. PR suggested that SFT could address this with Consort if NHSL thought this appropriate.</p> <p>The Steering Board recognised that timescales for response by Consort, while outlined in SA6, were outwith NHSL's influence. Their response is expected by 19/09/14 and MB suggested that the Commercial Sub-group of the Steering Board might also be required to meet with Consort before then. Availability in the w/c 08/09/14 to be confirmed.</p> <p>DR asked how the Steering Board felt that the change in financial close date should be communicated. It was agreed that slippage of 8 weeks was not of particular interest to staff, patients and the public, and no separate announcement would be made. Those working on the project would be informed and any media announcement following the anticipated planning committee approval on 27/08/14 could reference the programme.</p> <p>MB noted that if IHSL were still able to deliver the project for handover in time for programmed opening in May 2017 then the slippage in this phase was of less concern. BC noted that IHSL had proposed eight weeks slippage throughout the programme and it was agreed that IHSL should be challenged on this by the Commercial Sub-Group at the next opportunity.</p>	BC/SC
4.	<p>Project Risks Report</p> <p>As discussed earlier, risk 28 on the delivery of clinical enabling works is to be upgraded to a red risk.</p> <p>The impact of the referendum date on the availability of funding is no longer a risk with the revised programme, so this is to be closed on the risk register.</p>	SC SC
5.	<p>Project Finance Report</p> <p>BC presented this report in MP's absence, noting that it had been updated since circulation in July with further information on the enabling costs and F&RC reporting.</p> <p>SG noted concern about the increased clinical enabling costs. BC confirmed that the pre-tender costs had come in higher than anticipated and were currently being analysed by cost advisers in order to challenge Consort. This is a key item for the Commercial Sub-Group meeting with Consort.</p> <p>MB advised that any cost escalation in 2014/15 and 2015/16 would need to be covered by NHSL as the national capital allocation was already over-committed. MB noted that</p>	

	<p>SGHSCD had already committed considerably more than the capital agreed at OBC. CB asked if NHSL were in a position to manage the variation. SG acknowledged the pressure but stated that NHSL alone should not bear costs for a national project. GW stated that the anticipated increase in capital requirement needs to be raised with SEAT Boards.</p> <p>MB asked how confident NHSL were of the £36m equipment cost and JKS responded that the list that had been revised through design development was currently being scrutinised. JKS confirmed that the internal governance process for the approval of clinical developments with capital equipment would include submission to the Project Steering Board. Also, the SEAT working group established to look at service costs and workforce would include consideration of any related equipment to ensure regional support for developments. MB asked for confirmation that any equipment intended to be funded by charitable donations be acknowledged in the equipment costs. JKS and MP to report to the next Steering Board on equipment costs.</p>	SG/CB
6.	<p>Service Redesign update</p> <p>JKS spoke to the paper circulated. Appendices detailing the plans for each service in the NPD project plus the enabling required in the RIE will go out with the note of the meeting.</p> <p>The Steering Board approved the funding sought for the following redesign projects:</p> <ul style="list-style-type: none"> - £160k per annum for three years for one-stop dispensing in RHSC - £48.5k per annum for two years for adolescent workstream co-ordination - £44k per annum for two years for DCN nurse education <p>CB asked for confirmation that there is a clinical representative from NHS Fife engaged in service redesign. Craig Pratt attends for finance and JKS will check clinical representation.</p> <p>FM reported that the service was struggling to progress outpatients redesign. JKS noted that as there was still non-recurring redesign funding available and this might be best used on OPD and it was agreed that FM would develop a proposal to go to the RHSC Service Redesign Group in the first instance.</p>	FM
7.	<p>Proposal for the strategy to name the building</p> <p>DR presented the proposed process for naming the new building and the group agreed that this should bring positive publicity and promote a new identity and sense of public ownership.</p> <p>GW thanked DR for a well thought-out proposal to a difficult problem. IG stated that he felt the strategy was to look for a name for the building, and not to try to name the diverse services within it that sit under different management structures within NHSL.</p> <p>Having discussed the proposed strategy the group felt it was preferable that the public had the opportunity to suggest names for the shortlist, rather than limiting this to NHSL staff. With this change to be made, the PSB approved the strategy.</p> <p>DR will update the proposal and work with Stuart Wilson to approach the NHSL Chairman and other proposed panellists to confirm their support and involvement.</p>	DR
8.	<p>Pharmacy enabling works business case</p> <p>BC spoke to the business case that had been circulated, noting that the costs were based on pre-tender estimates at this stage.</p>	

	<p>The Steering Board noted that they did not have authority to approve business cases but as the £2.2m had been included in the clinical enabling in the FBC that will be funded by SGHSCD capital, this had already been approved by both F&RC and the Board.</p> <p>GW noted repeated reports from hospital staff about delays to discharge and insufficient pharmacy presence on the wards and asked if redesign and service improvement in pharmacy was being addressed as well as capital works and JKS confirmed that the redesign workstream included links to the Director of Pharmacy and her team.</p>	
9.	<p>Any other business</p> <p>BC noted that the eHealth proposal on Paper-light Hospitals is expected next month and</p> <p>SG asked how new technology and e-Health infrastructure was incorporated into the project, and whether e-Health should be invited to a future Steering Board meeting. JKS noted that she had a report on digital opportunities from 2013 and BC reported that the overdue eHealth proposal on Paper-light Hospitals is expected for next month. These issues are to be combined into a future agenda which M Egan and A McMahon are to be invited to.</p> <p>CB noted that IT developments in Fife for the new build had suffered from insufficient investment in implementation and work with users to change ways of working, and NHSL could learn from this.</p>	JKS
10.	<p>Date of next meeting</p> <p>26 September, 2014, 13.30-15.00, 56 Canaan Lane - <i>members to note later start time.</i></p>	

Meeting Title: PROJECT STEERING BOARD

Date/Time: Friday 26 September 2014, 13:30-14:30

Location: MacKinlay Room, 56 Canaan Lane

Attendees:

Susan Goldsmith	Director of Finance + Project Sponsor – NHSL (Chair)
George Walker	Non Executive Director – NHSL
Peter Reekie	Director, Finance and Structures – SFT
Brian Currie	Project Director – NHSL
Iain Graham	Director of Capital Planning and Projects – NHSL
Janice MacKenzie	Clinical Project Director – NHSL
Jackie Sansbury	Head of Commissioning – NHSL
Moira Pringle	Head of Strategic Financial Management – NHSL
David Ridd	Communications Manager – NHSL
Ashley Hull	Commissioning Manager – NHSL
Mike Robson	Clinical Lead – NHSL
Maureen Brown	Project Manager – Mott MacDonald Ltd

Apologies:

Mike Baxter	Deputy Director (Capital + Facilities) - SGHD
Chris Bowring	Director of Finance – NHS Fife; SEAT representative
Robert Wilson	Non Executive Director – NHSL
Jacquie Campbell	General Manager – Head and Neck
Tracy Miller	Partnership Representative – NHSL
Sorrel Cosens	Project Manager - NHSL
Fiona Mitchell	General Manager – Women’s and Children’s Services - NHSL

1.	Introductions and apologies	
	<p>SG confirmed an earlier progress meeting with IHSL had been both informative and positive.</p> <p>Ashley Hull (Commissioning Manger) and Mike Robson (Clinical Lead) both introduced themselves to the team.</p> <p>The apologies listed above were noted.</p>	
2.	Previous Action Notes from 22 August 2014	
	The notes were approved as an accurate record.	
3.	Matters Arising	
	<p><u>Outpatients Redesign Proposal</u></p> <p>Following the request for a dedicated lead to progress the outpatient redesign, agreement had been reached on 0.8 WTE backfill at Band 6 to support the operational Clinical Nurse who will now progress this work. This should ensure ownership by the service. SG stated assurance will be required throughout the project.</p> <p><u>Update on Naming Strategy</u></p> <p>DR confirmed a Naming Strategy Panel is currently being set up, with everyone involved i.e. public/ patients etc. The associated protocols for a ‘Royal’ name being sought.</p>	

7.	Clinical enabling update	
	<p>JKS spoke to the paper circulated, noting the following:</p> <ul style="list-style-type: none"> - Likelihood the project will slip 1 month - Renal / Critical Care currently out to tender. SG agreed, confirming this was a huge milestone. - Pharmacy is progressing well. - Renal/ Transplant construction to start a month later than planned assuming the Bio-quarter fit out is complete by end of January 2015. - A solution is required for the relocation of Occupational Health Services. - Associated workforce cost estimates will be reported at the next PSB on 31 October 2014. 	
8.	Any other business	
	<p>SG agreed site branding should be "NHS Lothian" and not include any commercial advertising; it should be used to raise the profile of the project and not for construction advertising. BC to discuss with IHSL.</p> <p>DR confirmed a time-lapse camera proposal has been discussed with IHSL.</p>	BC
9.	Date of next meeting	
	31 October 2014, 13.30-15.00, 56 Canaan Lane	

Meeting Title: RHSC + DCN Steering Board Commercial Sub-Group

Date/Time: Friday 26 September 2014, 12:00-13:00

Location: MacKinlay Room, 56 Canaan Lane

Attendees:

Susan Goldsmith	Director of Finance + Project Sponsor – NHSL (Chair)
George Walker	Non Executive Director – NHSL
Peter Reekie	Director, Finance and Structures – SFT
Brian Currie	Project Director – NHSL
Iain Graham	Director of Capital Planning and Projects – NHSL
John Ballantyne	Commercial Director - IHSL
Richard Osborne	Sponsor - Macquarie Capital Group Ltd
Juan Miguel-Custodio	Associate - Macquarie Capital Group Ltd
Maureen Brown	Project Manager – Mott MacDonald Ltd

Apologies: Sorrel Cosens Project Manager - NHSL

1.	Introductions and apologies	
	The apologies listed above were noted.	
2.	Programme	
	<p>A copy of the Target Financial Close Programme Critical Path, Revision 09 and dated 12/09/14 was handed out to all parties by IHSL during the meeting, with the following points noted below.</p> <p><u>Town Planning</u></p> <ul style="list-style-type: none"> - The revised Local Application for a revised Energy Centre Flue was submitted 5th September 2014. JB stated thier planning supervisor, Ironside Farrar, confirmed the 10th October 2014 discharge of planning application is achievable given consultation period has now closed. - JB confirmed Environmental Health have approved the revised flue proposals and associated calculations. <p><u>Cost Plan</u></p> <ul style="list-style-type: none"> - JB confirmed considerable progress had been made, the main aim being w/e 3rd October 2014 where the Board and Project Co are to agree the definition of scope of 'no material change' by the 6th October 2014. - Anomalies have come to light with IHSL's proposals in relation to Lift Car Sizes. BC confirmed that an internal meeting is due to be held this afternoon, with a workshop to be arranged early next week with IHSL to agree a way forward. - JB confirmed the capex would be adjusted to accommodate any Board Changes to Lift Car Sizes as appropriate.. An adjusted capex remains to be agreed with the Board. - It was agreed standard or modular lift sizes would be chosen as opposed to more expensive non – standard sizes. Any change would be submitted to Thomson Gray for review on behalf of the Board. - SG enquired as to what IHSL had provided at Glasgow Southern, JB to confirm to the board. - JB confirmed the Equipment List is currently being priced by IHSL, a copy of which will be issued to the Board w/c 29th September. 	<p>BC</p> <p>JB/BC</p> <p>JB</p> <p>JB</p>

	<p><u>Payment mechanism</u></p> <ul style="list-style-type: none"> - JMC confirmed good progress was being made with EIB. IHSL are confident the meeting scheduled for 1st October would answer all of the EIB questions including funder's deliverability. Meeting attendees are EIB Project Rep and Technical Team, Iain Graham, Brian Currie and Andrew Bruce (as confirmed by PR during the meeting). SG requested feedback following this meeting. - Process of short listing funders from 4 to 1 is ongoing. <p><u>Legal</u></p> <ul style="list-style-type: none"> - RO confirmed Interface was ongoing and progressing well. - RO confirmed Performance Bond had been accepted by funders and EIB. - Insurance – revised quote under review by Willis. - Petrol Filling Station – JB confirmed the final version of the interpretive report is awaited, however IHSL have no main areas of concern. - Interface with Consort ongoing, nothing fundamental to current programme. To date Consort has responded to IHSL by way of providing a table of comments. BC confirmed IHSL and NHSL are currently working through and responding to close out these issues. An Interface/ Consort meeting is due to be held 3rd October to review. SG requested feedback following this meeting. - JB confirmed the caveat of 'Operational Functionality' had now been resolved. 	JMC
		RO
3.	Risk	
	SG enquired as to IHSL's main risks, JMC confirmed the main risks to IHSL are the funder activities i.e. areas out with their control with 3 rd parties and Paymech.	
4.	Any other business	
	Nothing noted.	
5.	Date of next meeting	
	31 October, 2014, 12:00-13.00, 56 Canaan Lane	

	Post Meeting Notes	
	<p><i>Town Planning</i></p> <p><i>IHSL have subsequently confirmed that the statutory consultation period has in fact not closed and as a result the 10th October determination date is not secure. However, IHSL anticipate that consent will be granted before FC.</i></p> <p><i>Cost Plan + Lift Car Sizes</i></p> <p><i>The Board have subsequently confirmed to IHSL that the largest passenger lift car size stated in the relevant SHTM is adequate for a Children's Hospital and that in their opinion the lift core or shaft dimensions proposed and illustrated on drawings by IHSL will require to modification to accommodate it. However, the Board wish a number of FM lift cars to comply with the BCR's (Board's Construction Requirements) and not as proposed by IHSL. This will necessitate, in the Board's opinion, alterations to one core. The Board await IHSL's response.</i></p>	

Paymech Feedback

At a meeting held on 1st October the Board, in conjunction with SFT, agreed a position on the calibration of the paymech which is acceptable in principle to EIB and, hopefully, to the other senior debt provider who is anticipated to be appointed by the end of w/c 6th October, 2014. This gives c8 - 12 weeks to conclude all financing agreements. Our target revised FC date of the 28th November, 2014 will not be achievable should this activity take 12 weeks.

Consort Interface Update

A revised table of comments was received from Consort on the 8th October and many issues have now been closed out. Those that remain are deemed to be "work in progress" by all parties and will be resolved as the various stages of construction are approached. Meeting between the respective engineers and architects are planned to deal with any residual technical issues.

Meeting Title: RHSC + DCN Steering Board Commercial Sub-Group

Date/Time: Friday 31 October 2014, 12:00-13:00

Location: MacKinlay Room, 56 Canaan Lane

Attendees: George Walker Non Executive Director – NHSL (Chair)
 Peter Reekie Director, Finance and Structures – SFT
 Brian Currie Project Director – NHSL
 Iain Graham Director of Capital Planning and Projects – NHSL
 Sorrel Cosens Project Manager – NHSL
 John Ballantyne Commercial Director – IHSL
 Sean Ferm Commercial Manager – Macquarie Capital Group Ltd
 Juan Miguel-Custodio Associate – Macquarie Capital Group Ltd

Apologies: Susan Goldsmith Director of Finance and Project Sponsor – NHSL
 Mike Baxter Deputy Director (Capital and Facilities) – SGHSCD

1.	Introductions and apologies	
	The apologies listed above were noted.	
2.	Previous action notes from 26 September 2014	
	Were agreed as a correct record of the meeting with actions to be reported in IHSL's update on progress.	
3.	Programme to achieve revised target Financial Close date	
	<p>JMC apologised for not providing a programme at this stage, it was still be developed and agreed internally within IHSL.</p> <p>JMC reported that, as previously discussed with BC and IFG for the Board, financial close (FC) on 27/11/14 would not be possible. 12/12/14 was being targeted, but JMC stressed that this would be very challenging, leaving no float in the programme at all. The timescale was very tight for the Lenders' Technical Adviser (LTA) to review all documentation, to provide M&G and EIB with the assurance required to close.</p> <p>JMC also reported that governance processes in December would be restricted by the holiday period; M&G could be flexible, but EIB have said to Macquarie that their flexibility, being a public entity, is limited. All present agreed that if FC before Christmas was not achievable, then the next realistic close date would be in the second half of January.</p> <p>The Board do not wish to see delay in project completion and propose that any further delay to FC be absorbed in the construction period. BC stressed that the Board required the full programme, including construction, to the hospital opening date, and not just the critical path to target FC.</p> <p>GW noted that the Board team required understanding the position and programming dates in advance of NHSL Board meeting on 04/11/14. Similarly, PR would require an agreed position to report to a finance committee at the Scottish Parliament on 05/11/14.</p> <p>JMC committed to share the programme to FC and beyond with the Board by 03/11/14</p>	IHSL

at the latest.

GW stressed the importance of understanding if 12/12/14 was really feasible, as failure to meet this third attempt at FC would make all parties look foolish. PR asked if achieving close before Christmas would have a significant impact on the construction programme. JMC responded that he believed only site set-up was scheduled to start before January now, and that his preference would be to close before the end of 2014. He stressed again that this would be very challenging, and asked what the Board reaction would be to an end of January FC date with the potential for a good news story if it was achieved earlier.

[JB arrived at 12.35]

All agreed that slippage into 2015 would cause significant problems for both the Board and IHSL. Reputational risk was discussed. Significant project costs continue to be incurred by both parties pre-FC. Inflation is due to be factored in if FC falls after the start of January, which is 90 days after the target FC in final tender.

GW stated that he was disappointed by the lack of progress since the previous meeting and reassurances from IHSL, and losing confidence in their ability to propose an honest and realistic programme, and deliver to it.

JB noted that a meeting scheduled for that afternoon was due to review further technical information required for FC. GW asked if the completion of technical documentation was dependant on one meeting, and BC noted that with the completion of capex discussions a week earlier, he did not believe that further discussions were to resolve material matters and this alone should not be treated as the cause of delay. JB responded that the Board would have more certainty through extension of programme and further development of technical information. GW noted that funders also require certainty and line drawn in the sand as technical information would surely continue to develop post-FC.

PR asked JB if, in his opinion the Board had changed what it is asking for since the invitation to tender. JB replied that there was a difference of opinion over the level of detail expected in Project Co's Proposals (PCPs), but the open-ended requirement that 'the Board has to be satisfied' was difficult to achieve. JB acknowledged that the Board had agreed latitude on signing off operational functionality where 100% technical info not yet produced. Also, the Board's Construction Requirements had been updated in dialogue with IHSL, which reduced the extensive list of derogations that would be required of IHSL. These were examples of Board / IHSL negotiation to reach a pragmatic position in technical documentation for FC.

BC noted that if the design development had generated key technical information for review earlier in the process then areas of challenge, such as acoustics and fire, could have been addressed and resolved earlier. JB noted that sign-off of the 1:50 design by the Board had delayed the programme; BC acknowledged this, but that this could only account for two weeks of slippage and all had previously agreed that this particular activity has gone well. The production of the supporting architectural and engineering information has not been as successful.

GW summarised that four months slippage from October to the end of January would breach the inflation cap with cost implications for the Board. PR noted the Scottish Parliament's interest in the construction profile for the 2014/15 year; a start delayed from November to January would halve the construction activity in this year.

	<p>JMC asked JB how flexible the construction programme could be; the response was that the biggest risk is the start of the project, with ground works, piling and basement construction all being dependant on the ground conditions. JMC asked that Brookfield consider what can be absorbed in programme.</p> <p>JMC reiterated that he was supportive but very cautious about committing to FC for 12/12/14, it would only take one element of the programme to slip and they would fail. Due to ongoing internal review he was not happy to provide a detailed programme yet.</p> <p>GW asked what IHSL were going to do over the weekend to deliver a full programme for 03/11/14, and whether it would help for the group to reconvene on 03/11/14 to consider the resulting programme.</p> <p>PR noted that FC should be possible up to and including 19/12/14 and still happen ahead of January and the cut-off of the inflation cap.</p> <p>JMC confirmed that IHSL have shared as much as is ready with the funders; the Project Agreement is with M&G and technical, FM, and interface agreements with Lovells for review already. JMC raised the inflexibility of EIB's governance timescales, and PR offered to discuss this with them if required. JMC would contact EIB to discuss that afternoon, 31/10/14 and report back if SFT input could assist.</p> <p>IG asked that IHSL work with the Board now to plan the collation and production of documentation for FC with sufficient time for due diligence. He stressed that this needed commence almost immediately for any of the FC target dates now being discussed.</p> <p>JMC stated that funders would want comfort in the form of a report from their LTA with regards to the paymech, interface arrangements and technical information. JMC confirmed that the payment mechanism had been finalised and agreed.</p> <p>SF confirmed that in regard to the Consort interface, good progress had been made at a working level in the dialogue between the Board / Consort / IHSL and that the Board and IHSL were comfortable with the level of responses from Consort. The LTA are now reviewing interface documentation. IHSL will need to sit down with the LTA to walk through the interface documentation they are reviewing, as it is unique to this project. There are currently some gaps / conflicts between the PA and IHSL interface proposals and prior to sitting down with the LTA the Board & IHSL need to meet to agree how to close these gaps / conflicts. [Post meeting note: this was done on 06/11/14].</p> <p>SF confirmed that the LTA were reviewing interface documentation and appeared comfortable with the level of information and responses from Consort.</p> <p>SF confirmed that most PCPs had been issued to the LTA, with the exception of civil and structural, BREEAM, and acoustics. JB pointed out that the deadline to close PCPs had been 31/10/14 and that they were unlikely to meet this by the end of the day. BC confirmed that the Board has some technical queries outstanding on PCPs but have advised that these should not be material and therefore should not delay issue to the LTA. PR advised the Board and IHSL to resolve these issues or to ensure that they were captured as reviewable design data post-FC. BC undertook to review the Board's outstanding PCP queries with their technical adviser and collate any such non-material issues into a schedule to be addressed post-FC.</p>	<p>IHSL</p> <p>Board</p>
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	<p>The final list of derogations from the BCRs to be provided by IHSL later that day; the Board will review and respond to these on 03/11/14.</p> <p>BC noted that while drawings feedback had been provided, IHSL had challenged some of these and the Board had met with them to discuss and confirm the position. All outstanding drawings comments are to be issued by the Board on 03/11/14. It was noted that IHSL may want to meet to confirm some of these before they were fully concluded, and this would need to be prioritised in w/c 03/11/14.</p> <p>Conclusion of the energy strategy requires a meeting between the Board and IHSL as soon as possible in the w/c 03/11/14.</p> <p>The capex has been agreed and the opex would be addressed in a meeting scheduled for 05/11/14. BC stated that with completion of this exercise, IHSL should be in a position to confirm all technical documentation to the LTA early in the week commencing 03/11/14.</p> <p>JMC noted that this would have been required for mid-October for a 12/12/14 FC completion and that he was not comfortable with the pressure for the finance team to deliver when the technical info was late. In his opinion, 7weeks was tight and possibly unachievable to deliver FC. However, the finance team have been progressing where they are able, and he would receive by the end of the day the drafted financing agreements. These would need to be reviewed internally before sharing.</p> <p>PR asked whether the resource would be made available to focus a team to work together to achieve FC for 12/12/14. JMC stated that for the legal and financial workstreams this would be happening in London from 03/11/14.</p> <p>GW asked that a similar approach be taken to complete the technical resolution. BC stated that this was happening already with the co-location of Board, advisers and IHSL at the project offices and that the actions discussed would take priority over all other work.</p> <p>GW requested an update on IHSL's programme dates, and progress against the actions above, be shared with the members of this group by close of business on 03/11/14.</p> <p>The group agreed that, regardless of the FC date, IHSL and the Board should proceed to agree finalised technical documentation by 12/11/14 at the latest.</p>	<p>IHSL Board</p> <p>Board</p> <p>IHSL & Board</p> <p>IHSL & Board</p> <p>BC</p>
4.	Any other business	
	None noted.	
5.	Date of next meeting	
	21 November, 2014, 12:00-13.00, 56 Canaan Lane	

Meeting Title: RHSC + DCN Steering Board Commercial Sub-Group

Date/Time: Friday 21 November 2014, 12:00-13:00

Location: MacKinlay Room, 56 Canaan Lane

Attendees:

Susan Goldsmith	Director of Finance and Project Sponsor – NHSL (Chair)
George Walker	Non Executive Director – NHSL
Peter Reekie	Deputy Chief Executive – SFT
Mike Baxter	Deputy Director (Capital and Facilities) – SGHSCD
Brian Currie	Project Director – NHSL
Sorrel Cosens	Project Manager – NHSL
Mark Bradshaw	Macquarie – IHSL
John Ballantyne	Brookfield Multiplex – IHSL
Sean Ferm	Macquarie – IHSL
Juan Miguel-Custodio	Macquarie – IHSL
Ross Ballingall	Brookfield Multiplex – IHSL

Apologies: Iain Graham Director of Capital Planning and Projects – NHSL

1.	Introductions and apologies	
	All present introduced themselves.	
2.	Previous action notes from 31 October 2014	
	These were agreed as a correct record of the meeting.	
3.	Programme to achieve revised target Financial Close date	
	<p>The proposed programme with target Financial Close (FC) of 23/01/15 was issued to the Board on 11/11/14.</p> <p>SG noted that in this programme IHSL were presenting their fourth FC target date, giving rise to questions of credibility for all involved. SG asked that IHSL are open and honest about their ability to deliver this programme, as well as their commitment to achieving it. JMC responded that the programme was still challenging, with no buffer for unforeseen delay built in to reach FC on 23/01/15.</p> <p>JB confirmed that all technical information had been agreed and had been shared with the Lenders' technical advisers (LTA) for review and their report and recommendation is due to be completed and with funders on 12/12/14. Communication is underway between the LTA and Brookfield / Bouygues to explain and expand upon this technical information, and in addition to this a site meeting with Board representatives has been arranged for 11/12/14. JC confirmed that the 11/12/14 meeting was intended to be needed to validate their findings only.</p> <p>The largest outstanding risk to FC, due on 14/11/14 and not yet achieved, is the Board and IHSL agreement of Schedule Part 31. Consort's response to the Board is expected 24/11/14, and BC stated that if the response was as expected then it would be shared with IHSL that day. He also stressed that this agreement was between the Board and IHSL. SG asked what IHSL proposed to do if the interface response was not acceptable to IHSL's funders. SF noted that the Board, IHSL and Consort had been working together, and the interface proposals to date had already been shared with the LTA. On receipt of Consort's response by the Board, IHSL are lined up to</p>	

	<p>work with the Board on drafting Schedule Part 31, and then to walk the LTA through the detail.</p> <p>MBa asked if there was slippage built into the final production of documentation. MBr confirmed that while he understood concern due to previously missed dates, reaching FC was an iterative process with activities in parallel, and he felt that slippage could be made up.</p> <p>MBa asked if that meant that the Consort response, and the discussion with lenders' legal advisers, both on 24/11/14 would determine whether this programme with 23/01/15 FC was achievable. JC confirmed that it would.</p> <p>PR commented that the lender's legal adviser had provided a mark-up of the PA that gave SFT cause for concern, indicating areas of challenge that have previously been closed with IHSL. He asked why Macquarie, as part of IHSL, were not closing these down rather than sharing them with the Board.</p> <p>MBr responded that this was usual practice in such a contract, and that the legal advisers required reassurance for the lender, which could be provided jointly by IHSL and the Board. BC and Board legal and technical advisers are travelling to London to meet funders legal advisers on 24/11/14. MBr commented that many of the issues marked up would not be open for debate, being NPD standard form, and that Macquarie would support the commercial position signed off by IHSL at Final Tender. PR commented that it was disappointing that this had not been shared and progressed earlier. JC confirmed that the programme was not contingent on the Board's accepting these points on the PA, although they may seek agreement to some suggested clarifications in the non-standard form clauses.</p> <p>SG was reassured that IHSL felt the funders simply wanted a better understanding of the interface risk, and that the Board would support progressing this understanding through the meeting on 24/11/14.</p> <p>JC reported that both funders (M&G and EIB) have confirmed that they can meet the 23/01/15 timescale. M&G showed their commitment to the project through the funding competition and will be able to confirm their rating before Christmas if IHSL can provide detail by the end of this month. EIB Board support the project and approval to proceed to FC is scheduled for 14/01/15.</p> <p>SG highlighted that as the proposed programme was dependant on progress early in the next week, the Board would require progress reporting against the deliverables. This was requested in writing by the end of each week, with a further meeting in person before the Steering Board on 19 December.</p> <p>RB stated that he was uncomfortable with the programme proposed having no float in it, and suggested that Macquarie allow for some slippage. GW asked that IHSL agree their programme internally and come to the Board with a shared proposal, as this appeared to evidence of their not working as a single entity.</p> <p>MBr highlighted that interface (appendix A) was the key project-specific, and that the eight weeks from approval of this was the critical path to FC. BC highlighted that the programme now allowed only seven weeks for this to be achieved, and asked if IHSL now thought that 23/01/15 was unachievable. MBr responded that the Board meeting with IHSL and the lender's legal adviser would be key to this, all parties would have a clearer idea by the middle of the next week.</p>	
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	JC confirmed that the production of legal documentation was already well underway, and IHSL resource to drive to FC was. Assuming that the LTA does not raise significant issues to slow the process, the documentation is achievable in this programme. MBr supported this, emphasising that all in IHSL were working towards 23/01/15.	
4.	Condition precedent	
	<p>JB outlined that the proposed increase in capital costs, due to delay in reaching FC, was £1.6m and that IHSL were proposing an increase of £1m be passed to the Board. This is for construction costs only; no FM or SPV costs have been incorporated.</p> <p>SG noted that without certainty of the programme, the Board would not discuss the proposed increase to capex or the reasons for the delay.</p> <p>JB noted that, the construction programme and commencement notices were all based on completion of FC at 23/01/15. In the meantime, Brookfield would continue with minimal enabling works ahead of FC. JB and BC confirmed that operational interface planning with the RIE and Consort was progressing well. The construction completion date is now programmed for June 2017 as the FC slippage cannot be absorbed. The hospital would open in September 2017 in the latest programme.</p>	
5.	Any other business	
	<p>The Board requested weekly updates from IHSL, with progress against their programme and detail on any delays and issues so that the Board can assist with progressing these where possible. All are committed to achieving the 23/01/15 FC date, and IHSL are to confirm the likelihood of this on 25/11/14.</p> <p>The location for FC, assumed to be either London or Edinburgh, is to be worked through by the Project Team and IHSL. It is noted that the funders will have a preference for London.</p>	
6.	Date of next meeting	
	19 December, 2014, 11.30 – 12.30, 56 Canaan Lane	

Re-provision of RHSC and DCN at Little France

ACTION NOTES

Meeting Title: PROJECT STEERING BOARD

Date/Time: Friday 21 November 2014, 13:30-14:30

Location: MacKinlay Room, 56 Canaan Lane

Attendees:

Sorrel Cosens	Project Manager – NHSL
Brian Currie	Project Director – NHSL
Susan Goldsmith	Director of Finance + Project Sponsor – NHSL (Chair)
Janice MacKenzie	Clinical Project Director – NHSL
Fiona Mitchell	General Manager – Women’s and Children’s Services – NHSL
Moira Pringle	Head of Strategic Financial Management – NHSL
David Ridd	Communications Manager – NHSL
Jackie Sansbury	Head of Commissioning – NHSL
George Walker	Non Executive Director – NHSL

Apologies:

Mike Baxter	Deputy Director (Capital + Facilities) - SGHD
Chris Bowring	Director of Finance – NHS Fife; SEAT representative
Jacquie Campbell	General Manager – Head and Neck
Jim Crombie	Director of Scheduled Care – NHSL
Iain Graham	Director of Capital Planning and Projects – NHSL
Tracy Miller	Partnership Representative – NHSL
Peter Reekie	Director, Finance and Structures – SFT

1.	Introductions and apologies	
	<p>The apologies listed above were noted.</p> <p>SG reported that Robert Wilson, Non-Executive Director, was stepping down from the Project Steering Board. SG suggested that on completion of procurement, the Project Sponsor role would be taken on by Jim Crombie with the project’s emphasis on service redesign and commissioning a building fit for the purpose of the service. With this in mind, a Non-Exec on the NHSL Board’s Acute Committee might be best placed to join the Steering Board. BC asked for confirmation as to who would deputise for Jim Crombie if he was not available.</p> <p>There is a need to clarify the Partnership representation on this Project Steering Board (PSB), and clinical representation for DCN.</p>	<p>SG / JC</p> <p>SC</p>
2.	Previous Action Notes from 26 September 2014	
	The September notes were approved as an accurate record.	
3.	Matters Arising	
	<p><u>Outpatient redesign proposal</u></p> <p>JKS confirmed that funding has been allocated for RHSC OPD redesign, and meetings have been arranged with M Massaro-Mallinson and J Donnelly to progress the work.</p> <p><u>Paper-lite</u></p> <p>Following a presentation to the Capital Management Group, this workstream is also progressing, to report to the next PSB.</p>	BC

Re-provision of RHSC and DCN at Little France

ACTION NOTES

	<p><u>Catering capital costs</u> BC confirmed that £422k capital costs for changes to catering introducing cook chill facilities and equipment were incorporated in the £2.1m increased capex supported by SGHSCD.</p> <p><u>Lessons learned report from enabling works BT cable incident</u> A de-brief meeting is scheduled for 28/11/14 and Consort are also investigating a near miss H&S incident - updates to the next PSB.</p> <p><u>Full Business Case progress</u> BC reported that the increase in capex due to Board changes since the appointment of IHSL as Preferred Bidder had been agreed. IHSL's starting position had been over £5m, and the final cost to the Board was agreed at £2.1m; this has been approved by SGHSCD. Further costs associated with the delay to financial close are still to be considered. SGHSCD approval of the FBC is required to proceed to financial close.</p>	BC
4.	<p>Project Dashboard BC spoke to the dashboard report circulated ahead of the meeting, highlighting key issues.</p> <p><u>Financial Close date</u> The Commercial Sub-Group of the Steering Board had discussed financial close (FC) with IHSL just before this meeting; the target FC date is now 23/01/15 and the notices to commence construction and following construction programme are all updated to reflect this. The principal risks to 23/01/15 completion are the lenders' technical adviser reports and completion of the funding agreement. Key meetings in the next week will confirm progress and viability of 23/01/15.</p> <p><u>Achievements</u> Since the last PSB the Board has agreed the technical information for the Project Agreement with IHSL; this is now with the funders' technical adviser for review. Also, planning permission was granted for the revised flue design, and off-site flood works are being tendered now to be carried out from February to August 2015.</p> <p><u>Charities</u> Dialogue with the charities progresses to develop the enhancement projects that they are supporting and a paper on this will come to a future PSB. In response to a question from GW, it was confirmed that a focus of the ELHF donation is the DCN accommodation.</p> <p><u>Re-location of eHealth / Project Team</u> BC highlighted an enabling works risk that has arisen from the delay to construction start. Unless the project team is moved to interim accommodation, the Canaan Lane office will not be available to re-locate eHealth staff from the RIE in the time needed to carry out the works to provide critical and transplant / renal accommodation. There is a long and complex chain of moves to achieve this, and the alternative is a relocation of clinical information systems staff to another site, either as a temporary measure or in the long term if it is preferable to not move them twice. GW commented that this was not a red risk for this project, and needed to be picked up by the wider organisation.</p> <p><u>Traffic management and communications at Little France</u> The meeting discussed traffic management at the site, and the increased car parking pressure over the next 12 months. SG noted that this concern was shared up to Executive level in NHS, and that Consort is working closely with the Board to address</p>	JKS/BC

Re-provision of RHSC and DCN at Little France

ACTION NOTES

	<p>it. BC noted that not all of this could be attributed to the RHSC and DCN project and the associated Enabling Works, but nevertheless the project team had supported a campaign called 'Your Travel Choices' on the RIE site requiring team resources to be diverted at what is a critical phase in procurement for the project. Had the limit of 1703 spaces been adhered to (as per agreement with The City of Edinburgh Planning Dept) throughout the previous 12 months there would not be the continuing expectation from staff that the (temporary) increase in parking spaces would prevail. As a result, patients are now finding it extremely difficult to park and road congestion is exacerbated. GW reported first-hand experience of confusion with signage and works fencing, and that the site felt 'chaotic' and required tidying. The group agreed that the aesthetics of the site would contribute to visitors' perception of the organisation and it was important to reassure patients and the public whilst acknowledging that this comes at a cost. BC is to discuss this with Consort and their building contractor Balfour Beatty Construction. Parking and site management will be progressed through the Little France Campus Working Group, where stakeholders other than this project would take part in addressing traffic issues.</p> <p>Following FC permanent solid hoardings with NHS Lothian branding will go up around Car Park B. DR suggested that further information and images about the project on site would assist, and this is to be discussed by the Communications Group.</p> <p>The meeting felt that updating the map and information to go to patients should be a priority for the organisation. DR will follow this up with Clifford Burden in communications, providing up to date info on the project to be included.</p>	<p>BC</p> <p>DR</p> <p>DR</p>
<p>5.</p>	<p>Preferred Bidder Target Programme</p> <p>BC reiterated that expectations are that the target FC of 23/01/15 should be progressively secured as the Christmas break approaches however IHSL have communicated that there is no float available to cope with unknowns.</p> <p>The impact of the updated programme is that the handover date of the hospital would now be June 2017, followed by 12 weeks of commissioning before opening in September 2017. GW asked whether there was a point in the year that commissioning and transfer of services could not take place. FM responded that the peaks in activity in children's services were less predictable than in adults, and therefore planning around 'winter' or similar pressures would be very difficult. Seasonal increases in neuroscience patients are also not to the same degree as in other specialities, and the winter pressures in DCN were often attributable to boarding of other adult patients. JKS noted that in light of pressures and risks in current accommodation, the Board would need to move into the new facility at any point in the year.</p> <p>The meeting discussed the increased risk to sustainability of services at WGH with the removal of DCN capacity to support the wider site. GW noted that recent discussions to approve capital and revenue spends at the front door and on WGH capacity had not included the longer-term reduction in capacity on site when DCN moved in 2017. SG agreed, stating that the proposals were to address more immediate pressures, but that the WGH team need to be well sighted on the impact of the DCN move on medicine, critical care and imaging provision. It was agreed that the risk associated with separating neuro from oncology should be extended to recognise the impact on wider WGH services. At the same time, the reduction in boarding capacity should be flagged to the site team for their risk management.</p>	<p>SC</p> <p>JC</p>
<p>6.</p>	<p>Project Finance Report</p> <p>MP spoke to the report circulated in advance of the meeting.</p>	

Re-provision of RHSC and DCN at Little France

ACTION NOTES

	<p>Reduction in the forecast non-NPD capital spend shows the capital spend across the project at £800k less than that in the FBC, however MP noted that ongoing discussions regarding capex, charities income and tendering for non-NPD enabling and off-site works may reverse this position. SG noted that this was positive news, and the Board would need to discuss approach to managing this position with SGHSCD.</p> <p>Dialogue with SEAT Boards to develop shared understanding of operational costs continues. With current financial pressures it is recognised that difficult choices about the commissioning of services will have to be taken.</p> <p>SG reported that she had had a positive discussion with John Matheson about the additional costs incurred by NHS Lothian and Grampian Boards in developing NPD projects. As a result, MB was considering the extent to which central support could be made available.</p>																																		
7.	<p>Project Risk Register</p> <p>BC presented the updated risk register that had been circulated. The meeting agreed that the following updates should be reflected.</p> <p>Risk 5. – Insufficient revenue resource – this was previously closed with the revised capex (+£2.1m) due to Board changes post Final Tender being signed off by SGHSCD. The IHSL proposal that delays in FC beyond 03/01/15 comes with a further +£1m in construction costs has opened this up again. The Board will discuss this with IHSL once the FC programme is agreed.</p> <p>Risk 6. – Procurement process challenge – has been re-opened in acknowledgement that the changes between appointment of preferred bidder and financial close could increase the risk of challenge from Bidder A or Bidder C. Some present felt that this was unlikely, however advice from MacRoberts LLP is awaited.</p> <p>Risk 34 – Communicating traffic management and wayfinding – to reflect the discussion under item 4 above, this will be re-scored to an Amber risk.</p> <p>Risks 18 and 37 – Health and safety – in light of recent incidents and developing programmes for construction (enabling and NPD) the team are to re-visit these risks.</p>	<p>BC</p> <p>BC</p> <p>SC</p> <p>BC</p>																																	
8.	<p>Any other business</p> <p>Meetings for 2015 have been set up and invites sent out:</p> <table border="1"> <tr> <td>Friday 30th January 2015</td> <td>13:30 – 15:30</td> <td>MacKinlay Room (56 Canaan Lane)</td> </tr> <tr> <td>Friday 27th February 2015</td> <td>13:30 – 15:30</td> <td>MacKinlay Room (56 Canaan Lane)</td> </tr> <tr> <td>Friday 27th March 2015</td> <td>13:30 – 15:30</td> <td>MacKinlay Room (56 Canaan Lane)</td> </tr> <tr> <td>Friday 24th April 2015</td> <td>13:30 – 15:30</td> <td>MacKinlay Room (56 Canaan Lane)</td> </tr> <tr> <td>Friday 29th May 2015</td> <td>13:30 – 15:30</td> <td>MacKinlay Room (56 Canaan Lane)</td> </tr> <tr> <td>Friday 26th June 2015</td> <td>13:30 – 15:30</td> <td>MacKinlay Room (56 Canaan Lane)</td> </tr> <tr> <td>Friday 31st July 2015</td> <td>13:30 – 15:30</td> <td>MacKinlay Room (56 Canaan Lane)</td> </tr> <tr> <td>Friday 28th August 2015</td> <td>13:30 – 15:30</td> <td>MacKinlay Room (56 Canaan Lane)</td> </tr> <tr> <td>Friday 25th September 2015</td> <td>13:30 – 15:30</td> <td>MacKinlay Room (56 Canaan Lane)</td> </tr> <tr> <td>Friday 30th October 2015</td> <td>13:30 – 15:30</td> <td>MacKinlay Room (56 Canaan Lane)</td> </tr> <tr> <td>Friday 27th November 2015</td> <td>13:30 – 15:30</td> <td>MacKinlay Room (56 Canaan Lane)</td> </tr> </table>	Friday 30 th January 2015	13:30 – 15:30	MacKinlay Room (56 Canaan Lane)	Friday 27 th February 2015	13:30 – 15:30	MacKinlay Room (56 Canaan Lane)	Friday 27 th March 2015	13:30 – 15:30	MacKinlay Room (56 Canaan Lane)	Friday 24 th April 2015	13:30 – 15:30	MacKinlay Room (56 Canaan Lane)	Friday 29 th May 2015	13:30 – 15:30	MacKinlay Room (56 Canaan Lane)	Friday 26 th June 2015	13:30 – 15:30	MacKinlay Room (56 Canaan Lane)	Friday 31 st July 2015	13:30 – 15:30	MacKinlay Room (56 Canaan Lane)	Friday 28 th August 2015	13:30 – 15:30	MacKinlay Room (56 Canaan Lane)	Friday 25 th September 2015	13:30 – 15:30	MacKinlay Room (56 Canaan Lane)	Friday 30 th October 2015	13:30 – 15:30	MacKinlay Room (56 Canaan Lane)	Friday 27 th November 2015	13:30 – 15:30	MacKinlay Room (56 Canaan Lane)	
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Re-provision of RHSC and DCN at Little France

ACTION NOTES

9.	Date of next meeting	
	There will be no full PSB meeting in December 2014 and the group will meet on 30 January 2015.	

From: Kolodziejczyk, Kamil K [REDACTED]
Sent: 07 November 2016 07:41
To: Currie, Brian
Cc: 'ronnie.henderson [REDACTED]'; Greer, Graeme
Subject: FW: Environmental Matrix - Status B

Brian,

Further to last weeks PMG, and the discussion on upgrading the Environmental Matrix to status B, please refer to Colin Grindlay's email below re-requesting the Board upgrade the Environmental Matrix to status B.

Following a review of our previous comments that led to a status C, the caveats we have drafted on an upgraded status B may not sufficiently protect the Board. FYI I have pasted the previous comments below that led to the status C, as follows;

The Board notes the following general comments:

1. The Board has highlighted cells in blue and red bubble on the hard copy which require PCo review.
2. The Environmental Matrix should be updated to reflect the Production Group drawings.
3. Currently the matrix doesn't reflect the clinical lights schedule submitted through Clinical Lights Specification and Clinical Lights Technical Submittal.
4. EM shall be updated to reflect all circulation areas as per SoA.
5. Some lux levels don't appear to align with LG2.
6. Some ventilation rates don't appear to comply with BCRs. The Board would like to point that is still awaiting response from PCo to the issues raised as per MM-RFI-000172 & MM-GC-002006 relating to ventilation rates.

Some specific comments as follows:

1. See example G-D1-015 in the table - confirm filtration to physical measurement rooms.
2. Areas off the circulation area / corridor, i.e. 1-D6-060 Resus Bay, indicates transfer air but not known from where. Same principles applies to all Bays and Receptions.
3. See example 1-D7-005 in the table - indicates area of 4m2 however General Arrangement drawing shows 4.8m2. Please review this and all other similar instances.
4. See example 3-D9-009 in the table - indicates no cooling and no ventilation but filtration. Please review this and all other similar instances.
5. See example 3-D9-016 in the table - contradiction, please confirm for this and all other similar instances.
6. See example G-F1-037 in the table – only extract and filtration, please confirm for this and all other similar instances.
7. See example 1-H2-013 in the table – confirm temperature and cooling requirements for this and all other similar instances.

8. See example 1-L1-015 in the table – “via bedroom and en-suite” confirm extract rates for bedroom and en-suite.
9. All Dirty Utility rooms – please confirm dirty utility heating type and control.
10. Changing Cubicles – will be supplied with 18 deg C fresh air with no option to increase temperature. Please confirm.
11. Dictation Rooms - will be supplied with 18 deg C fresh air with no option to increase temperature. Please confirm.
12. 1-P1-067 (see table) – please confirm proposal.
13. 1-P1-090 and 1-P1-005 – should this not be other way round? Please confirm.

Whilst the Board has noted general and specific comments above, the Board reminds Project Co that unless the Board has already accepted a derogation, it is Project Co’s obligation to comply with the BCR’s / SHTMS etc, and the Board not commenting, does not remove that obligation on Project Co.

As you can see from the comments above, the comments are extensive hence we think the status C still applies, however as requested, we have drafted the following caveat for an upgraded status B;

“The Board have serious concerns over the upgrading Environmental Matrix to Status B considering some of the issues raised (as per MM-GC-002084) being the same as the issues that had been raised since FC. There are also concerns over the potential inaccurate information being transferred to the Room Data Sheets being submitted through RDD.

However, as requested by Project Co, the Board have upgraded the Environmental Matrix to status B, noting the Board still does not believe the Environmental Matrix and resultant design complies with the Project Agreement. Project Co’s failure to comply with the BCR’s / PCPs (as per MM-GC-002084), the Boar believes would result in a non-compliant Facility.

The Board would suggest that Project resolve the non-compliant issues as a matter of urgency, and requests that Project Co issues a strategy for resolution of these issues”.

Regards
Kamil

From: Colin Grindlay [REDACTED]
Sent: 03 November 2016 13:02
To: Kolodziejczyk, Kamil K [REDACTED]
Cc: Currie, Brian [REDACTED]; Ken Hall [REDACTED]; Darren Pike [REDACTED]
Subject: Environmental Matrix - Status B

Kamil,

As discussed in PMG, can you advise when we will receive confirmation of Environmental Matrix at Status B.

This would help us greatly.

Regards,

Colin Grindlay
Lead M&E Manager

MULTIPLEX

Multiplex Construction Europe Ltd

RHSC & DCN Project Office

Little France Crescent,

Edinburgh, EH16 4TJ, United Kingdom

T [REDACTED] DD [REDACTED] M [REDACTED]

E [colin.grindlay](mailto:colin.grindlay@[REDACTED]) [REDACTED]

W www.multiplex.global



Please note my email address has changed to colin.grindlay@multiplex.global

Please consider the environment before printing this e-mail.

This email and any attachments may contain confidential/legally privileged information, which is not waived. The contents are for the intended recipient/s only. Any unauthorised use is expressly prohibited. If you have received this in error please reply to notify the sender of its incorrect delivery, and then delete both it and your reply. Multiplex has no liability of any nature for any loss arising from this email or any attachments.

190131 IHSL.NHSL PLant Rooms.Ventilation Systems

To: Brian Currie
Lothian Health Board
Waverley Gate
2-4 Waterloo Place
Edinburgh
EH1 3EG

31st January 2019

Dear Sirs,

**"Re-Provision of RHSC and DCN at Little France
Plant Rooms + Ventilation Systems**

Further to your letter dated 28th January 2019 enclosing a letter from the Director - General Health & Social Care and Chief Executive NHSScotland please find our responses on the items listed relative to the construction and operational phases.

All Plant rooms must be secure and have adequate access controls in place at all times

Construction: - All plant rooms are secure with a procedure in place for entry and undertaking works.

Operations: - All plantroom access will be strictly controlled by the Helpdesk and Appointed Person (AP), Competent Person (CP) or Responsible Person (RP) depending on the works to be completed within. The key sets will be strictly managed with Permit to Access / Permit to Work control measures in place.

All plant rooms maintained clean and free of vermin

Construction: - All plant rooms are maintained clean and vermin free

Operations: - All plant rooms will be maintained clean and monitored for vermin activity. Vermin activity will be reported to the Board in line with the FM Service Matrix.

Standard Operating Procedure for the management of plant rooms are in place and being followed

Construction: - Procedures during the construction phase differ from those in the operational phase, however during the construction phase these have been in line with good industry practice.

Operations: - All Standard Operating Procedures for plant room works will be in place and align with the equipment within the locations.

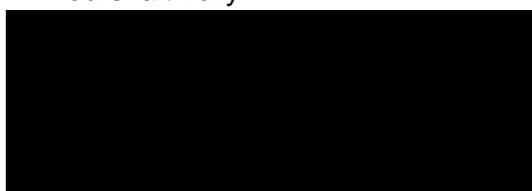
All critical ventilation systems inspected and maintained in line with 'Scottish Health Technical Memorandum 03-01: Ventilation for healthcare premises

Construction: - All ventilation systems have been designed, installed and commissioned in line with SHTM 03-01 as required, systems are maintained in such a manner which allows handover at actual completion to meet SHTM 03/01 standards.

Operations: - All critical ventilation systems will be inspected and maintained in line with 'Scottish Health Technical Memorandum 03-01: Ventilation for healthcare premises.

We confirm the necessary controls are in place and working effectively.

Yours faithfully



Wallace Weir
Project Co Representative

Re-Provision of RHSC and DCN at Little France

SECTION C21

13th January 2014 – FINAL TENDER
COMMERCIAL IN CONFIDENCE

A43373196



IHS LOTHIAN
INTEGRATED HEALTH SOLUTIONS



CONTENTS

C21 COMPLIANCE WITH BOARD'S CONSTRUCTION REQUIREMENTS.....1

C21 COMPLIANCE WITH BOARD'S CONSTRUCTION REQUIREMENTS

IHS Lothian confirms compliance with the Board's Construction Requirements subject to any derogations scheduled in our submission Section C30.

Approach to design and construction

Compliance with Board's Construction Requirements

C21

Bidders must confirm their compliance with the Board's Construction Requirements. If as their design has been developed there are specific areas of the Board's Construction Requirements that Bidders would seek to change, these shall be scheduled and provided in support of the statement. The Board shall not be required to accept any proposed amendments.

We confirm that our design solution complies with the Board's Construction Requirements including the Specific Clinical Requirements and Non Clinical Requirements. Where there are specific areas of these documents that we wish to clarify, our clarifications are set out in our response to C30.



Transmittal Summary



Project Title RHSC + DCN NPD Technical Advis
Project No. 290961
Subjob N/A
Transmittal No. 290961_0015
Date of Issue 03-Oct-2013

Mott MacDonald Limited
Caledonian Exchange, 3rd Floor,
19A Canning Street,
Edinburgh ,
EH3 8EG, United Kingdom,
+44 (0)131 221 2300

Title	Reference	Revision
Appendix A Evaluation Responsibilities Table 270913.docx		
Appendix B CD Info Flow + Comms.ppt		
Appendix C RHSC DCN Draft Final Tender Executive Summary Template 140813.doc		
Appendix D CONFIDENTIAL DFT Bidder X Strategic and Management Approach Proforma.xls.xlsx		
Appendix D CONFIDENTIAL DFT Bidder X D&C Proforma.xls.xlsx		
Appendix D CONFIDENTIAL DFT Bidder X FM Proforma.xls.xlsx		
Appendix E - CONFIDENTIAL FT Bidder X Strategic and Management Approach Proforma.xls.xlsx		
Appendix E - CONFIDENTIAL FT Bidder X D&C Proforma.xls.xlsx		
Appendix E - CONFIDENTIAL FT Bidder X FM Proforma.xls.xlsx		
Appendix F - Final Tender Evaluation Scoring Matrix 080813.xlsx		
Appendix G Confidentiality Agreement Rev 0B.doc		
Appendix H - Protocol for Storage and Management of Files clean.docx.doc		
RHSC DCN Dialogue Plan and Evaluation V1 5.pdf		
RHSC DCN Dialogue Plan and Evaluation V1 5.docx		
RHSC DCN Dialogue PPlan and Evaluation V1.4 to V1.5 comparison.docx		

Distribution	Copies/Medium	Purpose Of Issue
Graeme Greer	1E	IN
Andrew A. Duncan	1E	IN
Maureen Brown	1E	IN
Kamil K. Kolodziejczyk	1I	IN
Sorrel Cosens (NHS Lothian)	1E	IN

Issued by Graeme Greer

Medium:

E = Email Attachment, I = Internal-Email Link, C = CD/DVD, P = Paper, X = Extranet, F = FTP, N = Negative, O = Other

Purpose of Issue:

IN = For Information, CR = For Client Review, TR = For Tender, CN = For Construction, AB = As Built, IM = For Implementation, FC = For Comment, AP = For Approval, RC = For Records,

Style Definition: Document Map: Font: (Default) Calibri



A bright new future: A project to re-provide services from the Royal Hospital for Sick Children, Child and Adolescent Mental Health Service and the Department of Clinical Neurosciences

**in a single building adjoining the Royal Infirmary of Edinburgh
at Little France**

“Re-provision of RHSC and DCN at Little France”

**Competitive Dialogue Project Plan and Final Tender
Evaluation**

V 1.45

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Issue and Revision Record

Version	Date	Author	Checker	Approver	Description
1.0	17/04/13	KF	-	-	Initial Draft for comment.
1.1	09/06/13	GG			Draft for comment.
1.2	05/07/13	GG			Finance Comments included
1.3	01/08/13	AGS	GG		Legal and NHSL comments
1.4	14/08/13	AGS	GG		NHSL comments
<u>1.5</u>	<u>03/10/13</u>	<u>AGS</u>	<u>AAD</u>	<u>RDC</u>	<u>SFT comments; NHSL + Fin + Legal mark-up</u>

1. Introduction

Introduction

This manual is intended to provide for all members of the Re-provision of the Royal Hospital Sick Children (RHSC) and Department for Clinical Neuroscience (DCN) at Little France project team a guide on the competitive dialogue process, a guide on undertaking the Draft Final Tender reviews and a step by step guide on the Final Tender evaluation process, their role and what is expected from them during the evaluation as well as the tools necessary in order to undertake their role.

It will set out the dialogue programme and structure along with the project team and supporting resources including their roles and responsibilities and what is expected of them during this stage as well as the tools necessary in order to undertake their role.

Background

The Scottish Government Draft Budget published in November 2010 announced that both the RHSC and DCN projects would be delivered using the Non Profit Distributing (NPD) revenue funded model.

The procurement process was officially launched with the issue of a contract notice in the Official Journal of the European Union (OJEU) on 5 December 2012.

Pre-Qualification Questionnaire (PQQ) responses were received from three Candidates on 21 January 2013. Following evaluation of the PQQ responses all three Candidates were recommended to be invited to participate in dialogue and this was approved by the Project Steering Board on 22 February 2013.

The Invitation to Participate in Dialogue (ITPD) was issued to the three short-listed Candidates (Bidders) on 12 March 2013, which signified the commencement of the Competitive Dialogue period.

The Board will work with the three Bidders to develop their proposals with dialogue closing when the Board is comfortable that one or more solutions are capable of meeting its needs. An Invitation to Submit Final Tenders (ISFT) will be issued at this stage. Following evaluation of Final Tenders, the intention will be to select a Preferred Bidder whose bid represents the most economically advantageous tender whilst meeting the mandatory requirements, including a minimum quality score.

It is envisaged that the Board and the Preferred Bidder shall then proceed towards a position where the NPD Project Agreement can be entered into and signed. Once this position is reached, Financial Close can take place and the contract for the Project can be awarded.

2. Key Project Milestones

The key project milestones are set out in the table below, which have been extracted from the Strategic Development Programme version V14 (dated 13 August 2013). The dates noted below are subject to satisfying the requirements of the various Key Stage Reviews (KSR) carried out the Scottish Futures Trust (SFT) on behalf of the Scottish Government. The KSRs require to be validated by SFT before the next stage can proceed.

Key Project Milestone	Date
Issue ITPD/Commencement of Dialogue	12/03/13
Dialogue Meeting 1	w/c 01/04/13
Dialogue Meeting 2	w/c 29/04/13
Dialogue Meeting 3	w/c 27/05/13
Dialogue Meeting 4	w/c 24/06/13
Dialogue Meeting 4A	w/c 15/07/13
Dialogue Meeting 4B	w/c 22/07/13
Dialogue Meeting 4C	w/c 12/08/13
Dialogue Meeting 4D	w/c 02/09/13
Dialogue Meeting 5	w/c 16/09/13
Dialogue Meeting 5A	w/c 23/09/13
Draft Final Tender submission	21/10/13
Dialogue Meeting 6	w/c 18/11/13
<i>Pre-ISFT Key Stage Review (KSR) with SFT</i>	29/11/13
Close Dialogue	06/12/13
Invitation to Submit Final Tenders	06/12/13
Final Tender submission	06/01/14
<i>Pre-PB KSR with SFT</i>	12/03/14
Appoint Preferred Bidder	13/03/14
<i>Standstill Period</i>	24/03/14
<i>Full Business Case Approval by CIG</i>	30/09/14

<i>Pre-FC KSR with SFT</i>	30/09/14
Financial Close	04 02/10/14
Construction commences	02 03/10/14
<u>Construction completion date (target)</u>	<u>17/02/17</u>
Board commissioning commences	20/02/17
<u>Construction completion date (target)</u>	<u>17/03/17</u>
Hospital opening date	15/05/17

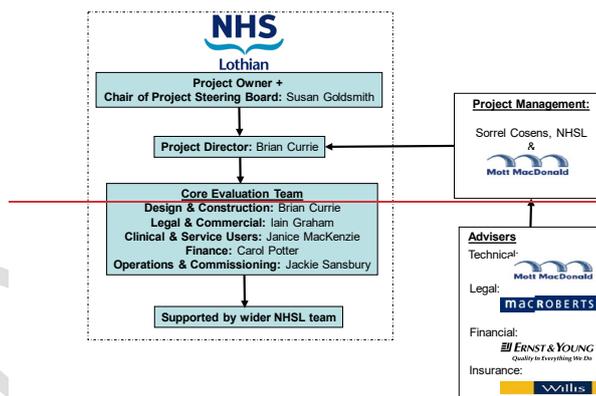
CONFIDENTIAL

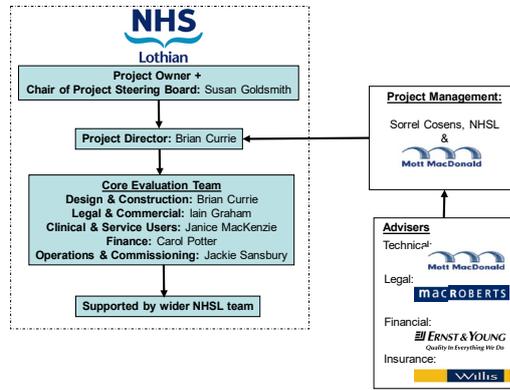
3. Project Team Structure

This section outlines the Board's resources for the competitive dialogue and final tender evaluation process and those of the Board's advisers. It also sets out the project structure as well as the roles and responsibilities for the key members of the team.

The structure shows the relationship between a Core Evaluation Team (**CET**) (that will be consistent throughout the procurement process and will be the principal assessment and evaluation body), the Evaluation Groups (that will provide technical, legal and financial input as required to support the Core Evaluation Team) and the Project Steering Board (that will ratify decisions made by the Core Evaluation Team).

The Procurement Management Team will be responsible for managing and overseeing all aspects of communication and engagement with the CET, Evaluation Groups and Bidders. This will range from meeting management and document control to overseeing the competitive dialogue and final tender evaluation process and processing clarifications and dialogue period queries with Bidders.





Field Code Changed

CONFIDENTIAL

3.1 Roles and Responsibilities

3.1.1 Procurement Management Team

The Procurement Management Team (PMT) will be responsible for managing and overseeing all aspects of competitive dialogue process and evaluation of final tender submissions.

The PMT comprises resources from the NHSL and Mott MacDonald:

- Sorrel Cosens (NHSL)
- Maureen Brown (Mott MacDonald)
- Kamil Kolodziejczyk (Mott MacDonald)
- Scott Abercrombie (Mott MacDonald)

The PMT will be supported by NHSL administrative resources:

- Lauren Lynch
- Ashley Riley

The responsibilities of the PMT include:

- Management of the competitive dialogue process;
- Liaise with financial, legal and technical advisers as required;
- Management of Dialogue Period Queries from Bidders;
- Issuing clarifications to Bidders;
- Control and distribution of Bidders submissions;
- Arranging dialogue meetings;
- Preparing and issuing dialogue meeting agendas;
- Recording and issuing dialogue meeting action notes;
- Management of procurement documentation via Conject;
- Document control;
- Single liaison point for all contact with Bidders;
- Management of the draft final tender evaluation;
- Management of the final tender evaluation;

The Procurement Management Team will be responsible for managing and overseeing all aspects of communication and engagement within NHSL and associated stakeholders and will act as the single point of contact for advisers within the procuring body for all matters in relation to procurement coordination.

3.1.2 Core Evaluation Team

The Core Evaluation Team (that will be consistent throughout the procurement process) is the principal assessment and evaluation body, assisted by the Evaluation Groups. The Project Steering Board will approve and sign off recommendations, within delegated authority limits, made by the Core Evaluation Team. A member of the Core Evaluation Team will take the lead in each of the Evaluation Groups.

The Core Evaluation Team comprises key representative of the Board, supported by the Board advisers. The key representative and the evaluation areas on which they will lead are:

- Brian Currie (Project Director)
- Iain Graham (Commercial and Legal)
- Janice Mackenzie (Clinical and Service Users)
- [Carol Potter (Finance)]¹
- Jackie Sansbury (Operations and Commissioning)

Support is provided by the following advisers and their teams:

- Technical: Richard Cantlay (Mott MacDonald)
- Legal: Andrew Orr (MacRoberts LLP)
- Financial: Michael Pryor (Ernst & Young)

Responsibilities of the Core Evaluation Team include:

- Lead on the individual dialogue meetings;
- Lead on the review of Bidders information submissions in advance of each dialogue meeting;
- Referring material issues / queries to Procurement Management Team for issue to Bidders;
- Lead the Evaluation Groups in evaluating all aspects of the final tender submissions in accordance with paragraph 5 (Tender Evaluation and Contract Award Criteria) set out in ITPD Volume 1;
- Final scoring and production of final tender evaluation report;
- Recommendation on Preferred Bidder to the Project Steering Board;

¹ [Carol Potter was a Core Evaluation Team member for competitive dialogue meetings 1-4, until leaving NHSL on 12/09/13. Iain Graham will lead on commercial \(financial and legal\) issues for evaluation.](#)

3.1.3 Evaluation Team

There will be three main areas of evaluation which cover each of the following subject areas:

- Technical;
- Financial; and
- Legal.

The technical evaluation covers 61 criteria across Approach to Strategic Management, Design and Construction, Approach to Facilities Management.

The evaluation of each criteria will be led by a member of the Core Evaluation Team and will include members of the NHS Lothian project team and advisers

The members of the Evaluation Team and the criteria they will be responsible for evaluating are included in Appendix A.

The Evaluation Teams responsibilities during Competitive Dialogue, Draft Final Tender and Final Tender are described in sections, 4, 5, and 6 respectively.

3.2 Summary of key Groups

The table below provides a list of individuals involved in the Evaluation Process

Group	Members	Advisers
Procurement Management Team	Sorrel Cosens (Project Manager)	Maureen Brown (Project Manager) Kamil Kolodziejczyk (Assistant Project Manager)
Core Evaluation Team	Brian Currie (Project Director) Iain Graham (Commercial and Legal) Jackie Sansbury (Operations and Commissioning) Janice Mackenzie (Clinical and Service Users)	Richard Cantlay (Lead Technical Adviser) Michael Pryor (Lead Financial Adviser) Andrew Orr (Lead Legal Adviser)
Strategic and Management	Iain Graham Brian Currie Janice MacKenzie Jackie Sansbury Ruth Kelly (Associate Director of HR) Alex Joyce (Employee Director) Howard Royston (Head of Estates) Eric Drennan (Health and Safety Officer)	Richard Cantlay Carol Thorburn (Technical FM Adviser) Robin Reid (Technical Health and Safety Adviser) Andrew Orr Michael Pryor
Design and Construction	Brian Currie Janice MacKenzie Fiona Halcrow (Service Project Manager)	Richard Cantlay Graeme Greer (Technical Adviser) David Stillie (Technical Architectural)

Group	Members	Advisers	Formatted Table
	Ernie Bain (Estates Manager) John Sturgeon (eHealth Head of Programmes and Development) Wayne Clemitson (System Administration Manager) Neil McLennan (Capital Project Manager) James Steers (Clinical Director) To be confirmed (Infection Control) Clive Armstrong (Head of Fire Safety) Lynn Allan (Project Accountant)	Adviser Colin MacRae (Technical M&E Adviser) Bryan MacKay (Technical C&S Adviser) Stuart Cull (Technical ICT Adviser) Andrew Duncan (Technical Construction Adviser) Fraser Littlejohn (Technical Planning Adviser) Rod Shaw (Technical Cost Adviser) Robin Reid (Technical Health and Safety Adviser) Andrew Orr	
Facilities Management	Jackie Sansbury Howard Royston {Clive Armstrong (Fire Officer)}	Rod Shaw Robin Reid Carol Thorburn	
Commercial	Iain Graham Lynn Allan	Michael Pryor Lindsey Crawford (Financial Adviser) Lucy Macarthur (Financial Adviser) Andrew Orr Lynn Pentland (Legal Adviser) Graeme Greer	

4. Competitive Dialogue Process

4.1 Overview

The competitive dialogue process is set out more fully in paragraph 4 (Competitive Dialogue Process) of ITPD Volume 1. It is not intended to replicate, in full, the content of that paragraph and therefore all members of the project team should read paragraph 4 of the ITPD to obtain a full understanding of the dialogue process as set out for the Project.

4.2 Competitive Dialogue Programme

Since publication of the ITPD in March 2013, the programme for competitive dialogue has been extended by eight weeks, inserting five additional meetings (4A, 4B, 4C, 4D and 5A). The programme dates below were shared with Bidders on 15 July 2013.

Activity	Week	Bidder A	Bidder B	Bidder C
Dialogue Opens				
Issue ITPD	0	12/03/13		
Briefing \ Q&A	1	Tue 19/03/13	Wed 20/03/13	Thu 21/03/13
Informal Submission 1	2	Mon 25/03/13	Tue 26/03/13	Wed 27/03/13
Dialogue Meeting 1	3	Tue 02/04/13	Wed 03/04/13	Thu 04/04/13
Informal Submission 2	6	Mon 22/04/13	Tue 23/04/13	Wed 24/04/13
Dialogue Meeting 2	7	Tue 30/04/13	Wed 01/05/13	Thu 02/05/13
Informal Submission 3	10	Mon 20/05/13	Tue 21/05/13	Wed 22/05/13
Dialogue Meeting 3	11	Tue 28/05/13	Wed 29/05/13	Thu 30/05/13
Informal Submission 4	14	Mon 17/06/13	Tue 18/06/13	Wed 19/06/13
Dialogue Meeting 4	15	Tue 25/06/13	Wed 26/06/13	Thu 27/06/13
Informal Submission 4A	17	Mon 08/07/13	Tue 09/07/13	Wed 10/7/13
Dialogue Meeting 4A	18	Tue 16/07/13	Wed 17/07/13	Thu 18/07/13
Informal Submission 4B	18	Mon 15/07/13	Tue 16/07/13	Wed 17/07/13
Dialogue Meeting 4B	19	Tue 23/07/13	Wed 24/07/13	Thu 25/07/13
Informal Submission 4C	21	Fri 02/08/13	Tue 06/08/13	Wed 07/08/13
Dialogue Meeting 4C	22	Tue 13/08/13	Thu 15/08/13	Fri 16/08/13
Informal Submission 4D	24	Wed 21/08/13	Thu 22/08/13	Fri 23/08/13
Dialogue Meeting 4D	25	Mon 02/09/13	Tue 03/09/13	Wed 04/09/13
Informal Submission 5	18	Fri 06/09/13	Mon 09/09/13	Wed 11/09/13
Dialogue Meeting 5	26	Mon 16/09/13	Tue 17/09/13	Thu 19/09/13
Informal Submission 5A	27	Wed 18/09/13	Thu 19/09/13	Fri 20/09/13
Dialogue Meeting 5A	28	Tue 24/09/13	Wed 25/09/13	Thu 26/09/13
Draft Final Tender Submission	32	Mon 21/10/13		
Dialogue Meeting 6	36	Tue 19/11/13	Wed 20/11/13	Thu 21/11/13
Close Dialogue	37	Mon 25/11 Thurs 05/12/13		
Invitation to Submit Final	38	Fri 06/12/13		

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Activity	Week	Bidder A	Bidder B	Bidder C
Tenders				
Submission of Final Tenders	43	Mon 06/01/14		
Activity	Week	Bidder A	Bidder B	Bidder C
Dialogue Opens				
-Issue ITPD	0	12/03/13		
Briefing \ Q&A	1	Tue 19/03/13	Wed 20/03/13	Thu 21/03/13
Informal Submission 1	2	Mon 25/03/13	Tue 26/03/13	Wed 27/03/13
Dialogue Meeting 1	3	Tue 02/04/13	Wed 03/04/13	Thu 04/04/13
Informal Submission 2	6	Mon 22/04/13	Tue 23/04/13	Wed 24/04/13
Dialogue Meeting 2	7	Tue 30/04/13	Wed 01/05/13	Thu 02/05/13
Informal Submission 3	10	Mon 20/05/13	Tue 21/05/13	Wed 22/05/13
Dialogue Meeting 3	11	Tue 28/05/13	Wed 29/05/13	Thu 30/05/13
Informal Submission 4	14	Mon 17/06/13	Tue 18/06/13	Wed 19/06/13
Dialogue Meeting 4	15	Tue 25/06/13	Wed 26/06/13	Thu 27/06/13
Informal Submission 4A	17	Mon 08/07/13	Tue 09/07/13	Wed 10/07/13
Dialogue Meeting 4A	18	Tue 16/07/13	Wed 17/07/13	Thu 18/07/13
Informal Submission 4B	18	Mon 15/07/13	Tue 16/07/13	Wed 17/07/13
Dialogue Meeting 4B	19	Tue 23/07/13	Wed 24/07/13	Thu 25/07/13
Informal Submission 4C	21	Fri 02/08/13	Tue 06/08/13	Wed 07/08/13
Dialogue Meeting 4C	22	Tue 13/08/13	Thu 15/08/13	Fri 16/08/13
Informal Submission 4D	24	Wed 21/08/13	Thu 22/08/13	Fri 23/08/13
Dialogue Meeting 4D	25	Mon 02/09/13	Tue 03/09/13	Wed 04/09/13
Informal Submission 5	18	Fri 06/09/13	Mon 09/09/13	Wed 11/09/13
Dialogue Meeting 5	26	Mon 16/09/13	Tue 17/09/13	Thu 19/09/13
Informal Submission 5A	27	Wed 18/09/13	Thu 19/09/13	Fri 20/09/13
Dialogue Meeting 5A	28	Tue 24/09/13	Wed 25/09/13	Thu 26/09/13
Draft Final Tender Submission	32	Mon 21/10/13		
Dialogue Meeting 6	36	Tue 19/11/13	Wed 20/11/13	Thu 21/11/13
Close Dialogue	37	Fri 06/12/13		
Invitation to Submit Final Tenders	38	Fri 06/12/13		
Submission of Final Tenders	43	Mon 06/01/14		

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4.3 Dialogue Meeting Structure, Arrangements and Agendas

Each monthly Dialogue Meeting (Dialogue Meetings 1-6) shall involve the Board spending time with each Bidder. The format of such monthly meetings shall be:

- Initial meeting between the Board's full Core Evaluation Team and Bidder's team;
- The initial meeting shall (if required) break out into a series of sub-meetings concentrating on legal, technical and financial aspects of Bidder's proposals;

- The sub-meetings shall re-convene for a final wrap up meeting with the Board's full Core Evaluation Team and Bidder's team.

4.4 Submission Requirements for Each Dialogue Meeting

In advance of each Dialogue Meeting, Bidders are invited to submit specific material related to the agenda topics to be discussed ("Informal Submissions"). These Informal Submissions by Bidders prior to the Dialogue Meetings shall enable the Board and its advisers to:

- review the work undertaken by Bidders since the previous Dialogue Meeting;
- provide any meaningful and relevant comments to the Bidders; and
- avoid any time disconnect between the Board's comments and the development of Bidders' Solutions.

The Informal Submissions above shall be required to be uploaded onto Conject in advance of each Bidder's Dialogue Meeting.

4.5 Information flow and Communications

Refer to Appendix B for the Competitive Dialogue Information flow and Communications

5. Draft Final Tender Review

5.1 Overview

The Draft Final Tender shall not be scored by the Board. The Draft Final Tenders shall be used as ~~tools during the Dialogue Period~~ a tool for ~~Bidders~~ the Board to ~~set out their Solutions to ensure that bidders have solutions capable of meeting its requirements, thus enabling~~ the Board ~~and for subsequent feedback on whether aspects of the~~ to proceed to conclude the Dialogue Period. It follows that review of Draft Final Tenders ~~shall focus on whether each bidder's submission meet the Board's requirements set out in the ITPD-~~ ~~(as supplemented and clarified by the Board during the Dialogue Period).~~

~~The Board will review the Draft Final Tenders to ensure compliance with the tender requirements set out within the ITPD and whether or not bids meet with the Board's minimum requirements. Detailed scoring of the Draft Final Tenders will not take place.~~ Consistent with the Board's requirement to ensure fairness between bidders, there will be no detailed feedback going beyond ~~matters of compliance, setting out where that bidder does not meet minimum requirements.~~

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~~A final Dialogue Meeting (6) will then take place as indicated on the programme. In advance of the final Dialogue Meeting, Bidders will receive written feedback from the Board on the content of their Draft Final Tender and will have the opportunity to clarify any outstanding points in the meeting.~~

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As the Draft Final Tender will contain each bidder's financial information, care needs to be taken to ensure that knowledge of each bidders' price information (sufficient to anticipate ~~price scoring~~ a Price Evaluation mark) is not known by those who will be undertaking ~~assessment of quality at Draft Final Tender Stage and~~ detailed ~~assessment and~~ scoring of quality at Final Tender Stage (this would include ~~C29~~ the financial submission, and submissions for technical criteria C29 and D13). In the absence of ensuring this, the Board risks bidder arguments that quality scoring at Final Tender Stage had been done in the knowledge of Draft Final Tender price (which might well remain the same in Final Tender submissions).

~~Finally, given~~ A final Dialogue Meeting (6) will then take place as indicated on the programme. In advance of the final Dialogue Meeting, Bidders will receive written feedback from the Board on the content of their Draft Final Tender as against the Board's minimum requirements and they will have the opportunity to clarify any outstanding points against that feedback in the meeting.

Given the approach that has been adopted, it is crucial for the Board to use the Draft Final Tender Stage and Dialogue 6 as the final point at which it can clearly and

precisely identify minimum requirements that a bidder is failing to meet. In the absence of picking such matters up with a bidder prior to Final Tender submission, such that the bidder does not have a clear and precise understanding of minimum requirements, the Board would risk legal challenge under the Regulation if it sought to exclude a Final Tender for failure to meet with minimum requirements.

The technical, financial and legal review of submissions will be reported to the Core Evaluation Team who will finalise the report to go to bidders.

~~A note of agreed actions will be produced as per the dialogue meetings.~~

A template for the Draft Final Tender Feedback reports is included in Appendix C. This template includes the following sections;

- Section 1 - Important Notice
- Section 2 – Introduction
- Section 3 – Key Points to be addressed from the Draft Final Tender
- Part A Technical Commentary
 - Sub Section A - Strategic and Management
 - Sub Section B - Design and Construction
 - Sub Section C - Facilities Management
- Part B Financial and Insurance Commentary
- Part C Legal Commentary

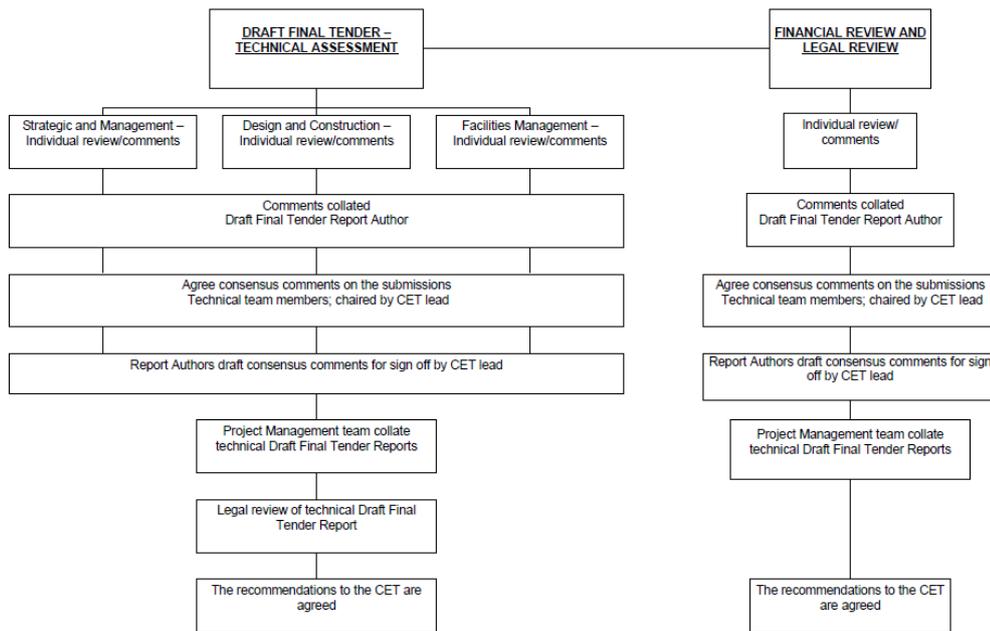
~~This Dialogue will provide high level verbal feedback to Bidders on the content of their~~

The Draft Final Tender including Feedback report will form the basis of the agenda and discussion for Dialogue 6. This will include, where applicable, discussing the extent to which the Board has identified any areas in which: (i) a Bidder falls short of minimum requirements, or (ii) the Bidder's submission would otherwise fail to be fully evaluated at Final Tender Stage.

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A note of agreed actions at Dialogue 6 will be produced as per all earlier dialogue meetings.

The process to be followed for the Draft Final Tender Assessment is summarised in the chart below:



5.2 Programme for Review of Draft Final Tenders

Activity	Dates
Submission of Draft Final Tenders	Mon 21/10/13
Issuing Submissions to the Evaluation Team	Tues 22/10/13
Review of Technical Submissions	Tues 22/10/13 – Fri 07/11/13
Report -Technical submission:	
- Strategic & Management	Mon 28/10/13
- Design & Construction <u>and ITPD Appendix C(iv) – Interface Proposals</u>	Fri 07/11/13
- Facilities Management	Fri 07/11/13
Review & Report - Financial submission	Tues 22/10/13 – Fri 08/11/13
Review & Report - Legal submission (Sub-set of Financial)	Tues 22/10/13 – Fri 08/11/13
Core Evaluation Team Review	Mon 11/11/13
Issue Evaluation Comments to Bidders	Wed 13/11/13
Dialogue Meeting 6	w/c 18/11/13
Project Steering Board - Project Update	Fri 29/11/13
Pre-Close of Dialogue KSR with SFT	Fri 29/11/13
Close Dialogue	Fri 06 <u>Thurs 05</u> /12/13
Issue ITSFT	Fri 06/12/13

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5.23 Technical Review

The Draft Final Tender technical evaluation will comprise the following steps relevant to assessment of whether the Board's requirements are met:

- Individual review and comment by the relevant member of the Technical Team as per the Evaluation Responsibilities Table in Appendix A;
- Comments to be collated by the Draft Final Tender report author (originator) as per the table below;
- For each criteria a meeting will take place with the relevant members of the technical team, chaired by the CET lead, to agree consensus comments on the submission;
- Consensus comments will be drafted by the report authors for CET lead sign off;
- The Procurement Management team will collate the technical Draft Final Tender Reports;
- Legal review of the technical draft final tender report;
- Agree report comments to be recommended to CET.

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In the Submission Requirements it is stated at some of the requirements that, in regard to the matter to be evaluated, 'for indicative purposes only it is anticipated that Bidders proposals may include' – then a list of indicative items is given. It should be noted that it is at the Bidders' discretion whether or not the list is followed in whole, in part or not at all. The purpose is to give bidders guidance. Bids should not be held to be incomplete or non-compliant if responses are not in line with the items listed.

It should be further noted that where Bidders are requested to submit a response 'for information only', this should be excluded from the completeness and compliance check and should not be evaluated.

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Group	Draft Final Tender Report Authors		
	Originator	CET Lead Sign off	Legal Reviewer
Strategic and Management	Sorrel Cosens	Iain Graham	Andrew Orr
Design and Construction	Graeme Greer	Brian Currie	Andrew Orr
Facilities Management	Carol Thorburn	Jackie Sansbury	Andrew Orr

The following Appendices are attached to this manual and are intended to support the review process:

- Appendix A – Evaluation Responsibilities Table, indicates those individuals and groups responsible for evaluating each of the Bid Response Requirements;
- Appendix C - Template Draft Final Tender Report to be completed by the report Authors;
- Appendix D – Draft Final Tender Evaluation Proforma, provides a document that the evaluation team can populate with comments.

5.34 Legal Review

The Board will review the Draft Final Tender to ensure compliance with the tender requirements. As Bidders are required to accept the Project Agreement in the ISFT, by this stage the Project Agreement should be agreed in all material respects. Derogations should have been received by SFT and Quantifiable Bidder Amendments ~~agreed and notified by EY to each Bidder.~~

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5.45 Financial Review

The financial submission from all three Bidders will comprise written answers to ~~the 2016~~ questions set out in the Submission Requirements element of the ITPD document, ~~and subsequent revision issued to Bidders on 30 August 2013~~ updated to reflect the fact that there will be a preferred bidder funding competition rather than fully funded tenders being submitted.

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Questions 1-97 ~~relate to the funding of the Bidders' proposals.~~

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~~Questions 8-16~~ relate to the assumptions underpinning the financial model that Bidders are required to submit at Draft Final Tender ~~and Final Tender~~ stage.

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~~Questions 10-20 relate to the funding of the Bidders' proposals. Of these questions, question 13 is no longer valid and questions 17 and 19 are to be revised in the light of the funding approach being taken.~~

Financial Model

The finance team will review each financial model using the following steps:

- Application of checklist to ensure compliance with ITPD instructions and required assumptions
- Identification of annual service payment cashflows
- Identification of surplus cashflows
- Identification of equalisation adjustment cashflows (pass through costs) – this may require liaison with technical workstreams to identify any elements of proposals that would impact NHS Lothian's costs eg Soft FM. Any such adjustments will be made known to bidders in the final dialogue round and discussed where required.
- Identification of any quantifiable bidder amendments that require valuation, to be notified to the finance team by technical and legal workstreams – valuation will be done via workshops to be attended by relevant parties. Values derived

will be notified to bidders in the subsequent dialogue round, with the logic behind the derivation of these values made clear to bidders so that they have the opportunity to mend their approach

- ~~Combination of the above elements to produce the overall Price of each bid, expressed as a single NPV value and then scored according to the process outlined in the ITPD.~~

The process of deriving the Price scores will be carried out entirely within the finance workstream and the result not made available to other workstreams ~~until the Core Evaluation Team meets to discuss overall findings once all review work is complete.~~

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Instead, the Core Evaluation Team will be provided with a report covering the following:

- Confirmation or otherwise that the financial proposals of each Bidder are affordable, identifying any areas where affordability is at risk or where any element of the price proposals requires further discussion with Bidders;
- Confirmation or otherwise that the information provided by Bidders is sufficient to carry out Price evaluation as set out in the ITPD, identifying any areas of deficiency;
- Identification of any Quantifiable Bidder Amendments to be applied.

The report will be in a format that can be used as the basis for discussion with Bidders on all three areas at the subsequent dialogue round.

Funding proposals

Bidders will set out their approach to funding proposals in response to the relevant questions in the ITPD, as amended to reflect the use of a post preferred bidder funding competition and included in the Financial Submission Requirements document of 30 August 2013.

~~These proposals are to be evaluated on a pass/fail basis as set out in section 5.5 of the ITPD on the following stated basis:~~

~~(a) — acceptability of proposed guarantees to be put in place to support the Project Co/consortium structure — this element will be assessed as being acceptable/not acceptable. — Where not acceptable, Bidders will be informed of the features of their proposals that are deemed not acceptable in the subsequent dialogue round so that these factors can be addressed for Final Tender;~~

~~(b) — extent of Funders due diligence completed and demonstration of a robust process for conclusion of the Funders due diligence — for Final Tender, Bidders will be required to submit certification of diligence work undertaken on behalf of the yet to be appointed funders, supported by diligence reports. For Draft Final Tender, it will be sufficient that Bidders confirm that the certificates and reports will be provided in the Final Tender. However, if draft versions are available, these should be submitted — the finance team will review these and provide any feedback in the subsequent dialogue meeting.~~

~~(c) — extent of demonstrated support of Funders (including assessment of the quality of letters of support and any conditions of financing) and summary for providers of any junior debt — Bidders should, at Draft Final Tender, indicate what evidence they intend to provide at Final Tender. Feedback on these proposals will be given at the subsequent dialogue. However, if draft versions are available, these should be submitted — the finance team will review these and provide any feedback in the dialogue meeting.~~

These proposals will be reviewed with reference to the scoring scheme as set out in the revised Financial Submission Requirements document, whereby the Price Evaluation mark for each Bidder is be adjusted according to the deduction, if any, attributed to the adequacy of that Bidder's response to the questions relating to funding approach.

The finance team will agree a provisional score relating to the adequacy of the funding approach of each Bidder and will provide feedback to each Bidder on this provisional score in the subsequent dialogue meeting. This provisional score will form part of the report to be submitted to the Core Evaluation Team.

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6 Final Tender Evaluation

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6.1 Overview of Evaluation Process

The tender evaluation and contract award process is set out more fully in paragraph 5 (Tender Evaluation and Contract Award Criteria) of ITPD Volume 1. It is not intended to replicate, in full, the content of that paragraph and therefore all members of the project team should read this section to obtain a full understanding of the approach to the evaluation methodology for the Final Tenders.

The Final Tender evaluation will comprise the following steps:

- Completeness and compliance check;
- Compliance with the Stand Alone Requirements;
- ~~Evaluation of Funding Proposals;~~
- Evaluation of all of the Quality Evaluation Criteria on a pass/fail basis;
- Evaluation of those Quality Evaluation Criteria that are evaluated on a scored basis;
- Price Evaluation (including commercial aspects); ~~and~~
- ~~Evaluation of Funding Proposals; and~~
- Legal Review
- Combination of Price Evaluation Mark and Quality Evaluation Mark, resulting in a mark out of 100 being awarded to each Bidder.

Please note that should a Final Tender fail any of the first ~~four~~ three steps above then the Final Tender will be deemed to be non-compliant and no further evaluation will be carried out.

The contract award will be on the basis of the offer, contained in the Final Tender, which is the most economically advantageous.

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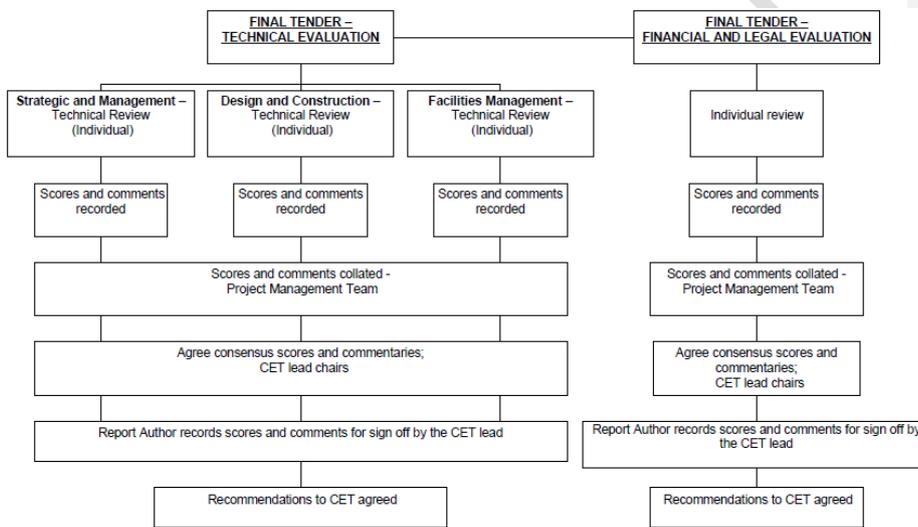
The following Appendices are attached to this manual and are intended to support the evaluation process:

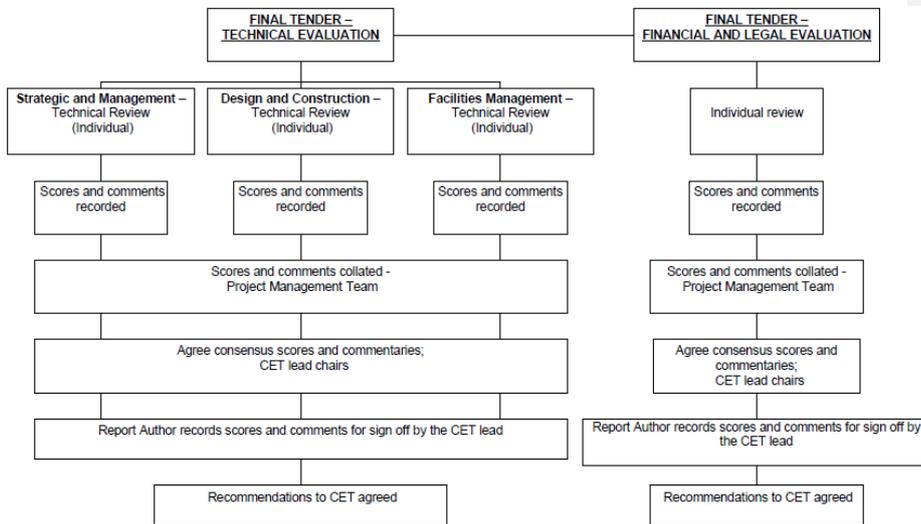
- Appendix E - Final Tender Evaluation Proforma, provides a document that the evaluation team can populate with comments and scores. This also acts as a checklist of submission requirements supplemented by Appendix I which lists the Design Deliverables and Specifications.
- Appendix F - Final Tender Evaluation Scoring Matrix, provides a spreadsheet that when the consolidated score is input, will provide the overall weighted score.

As the Final Tender will contain each bidder's financial information, care needs to be taken to ensure that knowledge of each bidders' price information (sufficient to anticipate price scoring) is not known by those who will be undertaking detailed

assessment and scoring of quality at Final Tender Stage (this would include ~~G29~~the financial submission, and submissions for technical criteria C29 and D13). In the absence of ensuring this, the Board risks bidder arguments that quality scoring at Final Tender Stage had been done in the knowledge of Final Tender price.

The process to be followed for the Final Tender Evaluation is summarised in the chart below:





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6.2 Programme for Evaluation of Final Tenders

Activity	Dates
Submission of Final Tenders	Mon 06/01/14
Completeness Check	Tues 07/01/14 – Weds 08/01/14
Issuing Submissions to the Evaluation Team	Thurs 09/01/14
Review of Technical Submissions	Thu 09/01/14 – Fri 31/01/14
Report -Technical submission:	tbc
Strategic & Mgt	tbc
Design & Construction	tbc
Facilities Management	tbc
Review & Report -Financial submission	Thu 09/01/14 – Fri 31/01/14
Review & Report - Legal submission (Sub-set of Financial)	Thu 09/01/14 – Fri 31/01/14
Evaluation Group Report	Mon 03/02/14 – Fri 07/02/14
Core Evaluation Team Final Evaluation	Mon 10/02/14 – Wed 12/02/14
CET Report for Project Steering Board	Wed 12/02/14 – Fri 14/02/14
Project Steering Board Approval for PB	Fri 14/02/14
F&R Committee Approval for PB	Wed 12/03/14
Pre-PB KSR with SFT	Wed 12/03/14
Appointed of Preferred Bidder	Thu 13/03/14

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6.3 Completeness & Compliance check

The Final Tenders received from all Bidders will firstly be checked by the Procurement Management Team for compliance with the submission requirements and completeness. Non-compliant and/or incomplete Final Tenders submissions may be rejected by the Board.

In the Submission Requirements it is stated at some of the requirements that, in regard to the matter to be evaluated, 'for indicative purposes only it is anticipated that Bidders proposals may include' – then a list of indicative items is given. It should be noted that it is at the Bidders' discretion whether or not the list is followed in whole, in part or not at all. The purpose is to give bidders guidance. Bids should not be held to be incomplete or non-compliant if responses are not in line with the items listed.

It should be further noted that where Bidders are requested to submit a response 'for information only', this should be excluded from the completeness and compliance check and should not be evaluated.

6.4 Compliance with Stand Alone Requirements

The Procurement Management Team, with input from the Board's advisers as required, will check each Final Tender for compliance with the Stand Alone Requirements as identified in paragraph 2.3 (Stand Alone Requirements) of ITPD ~~Volume 4~~ Volume 1 including ITPD Volume 1 Appendix C (iv) – Interface Proposals. Any Final Tenders which do not comply with the Stand Alone Requirements will

result in the Final Tender being deemed non-compliant and therefore rejected by the Board.

6.5 Evaluation of Technical Submission

The Final Tender technical evaluation will comprise the following steps:

- Individual review, recording scores and comments;
- [Submission of score and comments to be collated by the Procurement Management Team]
- Meeting chaired by the CET lead for each criteria to agree consensus score and commentary on the submission
- Scores and comments recorded by the report authors for CET lead sign off
- Collation of technical final tender evaluation to be recommended to CET

Group	Final Tender Report Authors		
	Originator	CET Lead Sign off	Legal Reviewer
Strategic and Management	Sorrel	Iain Graham	Andrew Orr
	Cosens		
Design and Construction	Graeme	Brian Currie	Andrew Orr
	Greer		
Facilities Management	Carol	Jackie Sansbury	Andrew Orr
	Thorburn		

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6.6 Guidance on Quality Scoring (Technical)

"Evaluation Guidance" is provided in paragraph 5 (Tender Evaluation and Contract Award Criteria) as set out in ITPD Volume 1 for each of the Quality Evaluation Criteria, [particularly Section 5.6](#).

6.6.1 Pass/Fail tests

In the first instance all of the responses to each question will be evaluated on a pass/fail basis. This also includes those responses that are subsequently scored. Provision is made in the Appendix E proforma to record the outcome of this pass fail evaluation. As noted in paragraph 6.1 above should a Final Tender fail this test then the Final Tender will be deemed to be non-compliant and no further evaluation will be carried out. 6.6.2 Scored questions — ~~refer to table~~

A detailed evaluation of the scored questions for the submissions that passed the Pass / Fail criteria is then undertaken. Scoring will be done by the Evaluation Groups and the Core Evaluation Team for the questions specified in ITPD Volume 1 Table A at paragraph 5.6.3.

Responses to each question will be scored out of 10. Each score will be based on the degree to which the response covers the range of factors specified in the relevant Evaluation Guidance and as appropriate / relevant to the question, depth of understanding of the issues and relevance and quality of examples and experience provided as set out ~~below:~~

~~6.6.2 Scored questions~~

~~A Detailed Evaluation of the scored questions for the submissions that passed the Preliminary Evaluation will then be undertaken. Scoring will be done by the Evaluation Groups and the Core Evaluation Team for the questions specified in the table at section 2 of this document.~~

~~These questions will be scored out of 10 using the scoring system described in the ITPD.~~

~~in ITPD Volume 1 Table A at paragraph 5.6.3. The scores will then be multiplied by the weighting agreed for each question (as detailed in the Evaluation Table in the ITPD and in Appendix A of this Evaluation Manual) to calculate the final score for each submission.~~

~~In the Submission Requirements it is stated at some of the requirements that, in regard to the matter to be evaluated, 'for indicative purposes only it is anticipated that Bidders proposals may include' – then a list of indicative items is given. It should be noted that it is at the Bidders' discretion whether or not the list is followed in whole, in part or not at all. The purpose is to give bidders guidance. Bids should be evaluated on this basis. It should be further noted that where Bidders are requested to submit a response 'for information only', this should not be evaluated.~~

Using the Final Tender Evaluation Proforma in Appendix E, the Evaluation Group members will each undertake individual evaluation of the relevant evaluation criteria within each Bidders' Final Tender Submissions against the prescribed scoring criteria before meeting with their Group in a workshop, chaired by the Core Evaluation Team member leading that Group, to agree the final consensus scores for each of the evaluation criteria for which that Group is responsible.

Once the evaluation has been completed for each Bidder the Core Evaluation Author and CET Lead will be responsible for preparing the final scoring report using the Final Tender Evaluation Scoring Matrix at Appendix F, with associated commentary, as appropriate. The completed scoring report will be submitted to the Core Evaluation Team to allow the final scores to be checked and verified and the selection of the Preferred Bidder to be made.

Whilst it is envisaged that the Technical Evaluation for all three Bidders will be carried out on the same day, where scoring occurs on separate days, the advice is that this is not prevented by the Public Contracts (Scotland) Regulations 2012 (the Regulations). A potential area of questioning by a bidder might be "was Bidder A marked more/less harshly" on account of being the first and how was objectivity

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ensured? However, provided all scoring is objective and backed up with reasons for particular marks awarded, there ought not to be a procurement issue with the approach.

Separately, given the different dates for some of the evaluations, it will be important to ensure absolute consistency in the individuals involved in assessing across each of the three bidders. As previously noted, it is strongly recommended that the technical/quality evaluations are demonstrably done without knowledge of financial scoring.

6.7 — Evaluation of Funding Proposals

~~Bidders will set out their funding proposals in response to the relevant questions in the ITPD, amended to reflect the use of a post-preferred bidder funding competition.~~

~~These proposals are to be evaluated on a pass/fail basis as set out in section 5.5 of the ITPD on the following stated basis:~~

~~(a) — acceptability of proposed guarantees to be put in place to support the Project Co/consortium structure — this element will be assessed as being acceptable/not acceptable.~~

~~(b) — extent of Funders due diligence completed and demonstration of a robust process for conclusion of the Funders due diligence — for Final Tender, Bidders will be required to submit certification of diligence work undertaken on behalf of the yet to be appointed funders, supported by diligence reports. Provision of these documents will constitute an acceptable proposal.~~

~~(c) — extent of demonstrated support of Funders (including assessment of the quality of letters of support and any conditions of financing) and summarily for providers of any junior debt — Bidders should provide the evidence indicated at DFT stage. Provision of clear support from junior investors (letter of support etc) will be required to pass. Bidders providing evidence of clear engagement with funders (eg letters of support, provision of draft funding terms, engagement with providers of different types of funding) will also pass.~~

6.8

6.7 Legal Evaluation

Bidders shall be awarded a pass if they accept the Final Tender (Bidder Specific) Project Agreement. If a pass is ~~received, the~~awarded, then Quantifiable Bidder Amendments will be applied.

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6.98 Price Evaluation

Economic Cost

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The Economic Cost of the Submission will be determined by calculating the Net Present Value (NPV) of each Submission to the Board over the period of the NPD Project Agreement using the following components:

- a) NPV of Annual Service Payment - The proposed total Annual Service Payment stream in the Bidder's Financial Model taken from financial proforma 1 and verified against the Financial Model, prepared using the assumptions and specifications set out in paragraph [3.9] of the ITPD. The NPV will be calculated using the Treasury real discount rate of [3.5% (6.0875% nominal)];
- b) NPV of Surpluses - The forecast level of surpluses in the Bidder's Financial Model as presented in financial Proforma 2 and verified against the Financial Model will be deducted from the NPV of the total Annual Service Payment. Due to the more uncertain nature of the surplus payments the NPV will be calculated using a real discount rate of 4.39% (7.0% nominal);
- c) Equalisation Adjustment - The additional material related costs and revenues to be borne by the Board as a result of any Final Tender Submission, including energy and utilities, rates and insurance costs. The impact of such costs will be estimated by the Board and expressed as an NPV of the adjustments made, discounted at a real rate of [3.5%]. The result will be added to the NPV of the Final Tender Submission (an '**Equalisation Adjustment**'). Any such adjustments, as identified through the Draft Final Tender review process, will have been discussed with Bidders at the final dialogue round; and
- d) Quantifiable Bidder Amendments - The Economic Cost will include an amount that reflects the deemed value (whether positive or negative) of any a) amendments, caveats or qualifications to the contract or specification that affect the risk profile of the Project or b) elements of the response to the Financial Submission Requirements, that have or, in the reasonable opinion of the Board may have, a significant and quantifiable financial impact on the Board (a '**Quantifiable Bidder Amendment**'). For this purpose, the deemed value of the Quantifiable Bidder Amendment will be the estimated financial impact to the Board of the risk occurring multiplied by the estimated probability of that risk being realised. Such values will be converted to an NPV using the 3.5% real discount rate.

Where any such Quantifiable Bidder Amendments and/or Equalisation Adjustments are identified, these will have been discussed and the deemed value shared with each Bidder during the final dialogue round.

Price Evaluation Matrix

The Economic Cost derived from the components described in sub paragraphs a) – d) above will be scored as shown below, with the Bidder with the lowest Economic Cost scoring the maximum 60 (the **Price Evaluation mark**). This will form the

benchmark, with the economic cost of the other Submissions receiving marks in proportion to the difference in price from the lowest according to the example below.

Example:

Bid AX	lowest	———— = 60.00 marks = 60.00%
Bid BY	6% higher	———— = 54.00 marks = 54.00%
Bid CZ	60% higher	———— = 0.00 marks = 0.00%

Note: marks will be scored to 2 decimal places and that the lowest score possible for price will be capped at zero marks.

Evaluation of Acceptability of Funding Approach

Bidders will set out their approach to funding in response to the relevant questions in the ITPD as amended to reflect the use of a post preferred bidder funding competition and included in the Financial Submission Requirements document of 30 August 2013.

These proposals are to be evaluated on the scored basis as set out in the revised Financial Submission Requirements document. The Price Evaluation mark for each Bidder will be adjusted according to the deduction, if any, attributed to the adequacy of that Bidder's response to the questions relating to funding approach.

6.409 Combining Price and Quality Evaluation

For each Bidder, the mark for the Price Evaluation (out of 60, potentially adjusted downwards for any deduction made in respect of scoring of Bidder responses to questions relating to Acceptability of Funding Approach) will be added to the mark for the Quality Evaluation (out of 40) to give a total mark out of 100. The Final Tender with the highest combined mark will be deemed by the Board to be the most economically advantageous tender.

6.410 Preferred Bidder Recommendation by the Core Evaluation Team

The Core Evaluation Team will agree their recommendation for Preferred Bidder and prepare a report for presentation to the Project Steering Board. The Project Steering Board and NHSL Finance and Resource Committee must approve the Preferred Bidder recommendation.

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6.421 Completing Evaluation Reports for each Bidder

The Board will provide each unsuccessful bidder with a 'standstill letter' informing it of its decision to award the contract.

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This will include the identity of the successful bidder and the evaluation scores that both it and the successful bidder received against each scored evaluation criterion, and a summary of the characteristics and advantages of the successful bid as against those of the bid which that bidder submitted.

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For the summary, the Board will seek to identify principal bid elements in respect of which the successful bid scored highly and corresponding elements of the unsuccessful bid which received relatively low scores, ~~recognising this will be a matter of selective judgment.~~

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The Board will consider Bidders requests for further information and seek to provide additional information where this is reasonable.

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~~7.~~ **7. Confidentiality**

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7.1 Introduction

In order to assist the Board in ensuring that it complies with duties under the Public Contracts (Scotland) Regulations 2012 and underlying European Directives, all persons involved in the evaluation process must act at all times with fairness and transparency and in a way that ensures non-discrimination and equal treatment. In particular, it is essential that the principles set out below are adopted by all.

7.2 Transparency / objectivity of decision making

The Board requires to be able objectively to justify all pass/fail and scoring decisions ~~including, in relation to the latter, reasons for a Bidder receiving a higher or lower score than other Bidders on each scored question.~~ To achieve this, the Evaluation Team must ensure that they record reasons for any decision to fail on a pass/fail question and in respect of scores given. In addition, to minimise the risk of potential challenge, there must be consistency in the evaluating and scoring of all Final Tender Submissions in order to minimise the possibility of any divergence in approach or interpretation as between the scoring of each Bidders Final Tender Submission.

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7.3 Fairness / equal treatment / non-discrimination - conflicts of interest

The Board requires to be able to demonstrate that the Evaluation Team carried out its evaluation fairly and without preference to any particular Bidder.

7.4 Fairness / equal treatment / non-discrimination – confidentiality

The Board must be in a position to control the flow of information relevant to the procurement at all times and ensure that all Bidders are treated in accordance with obligations upon the Board.

In addition to observing the above and the best practice also set out in this section, each member of the Evaluation Team will require to sign conflict of interest and confidentiality forms (Appendix G), confirming that they have no conflict of interest in carrying out their evaluation role and that they shall ensure confidential treatment of all information relevant to the procurement process.

Failure to observe the above and the best practice below may prejudice the procurement process and result in disciplinary action for employees of the Board or legal action against the individual / organisation providing evaluation input as part of professional services to the Board.

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7.5 Best Practice

Evaluators should also be aware of and adhere to the ~~following~~ best practice guidelines. The framework for ensuring that best practice is in place in regard to the storage and management of information and files is outlined in Appendix H – Protocol for Storage and Management of Files. The following also summarises other areas of best practice guidance to be followed:

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- The evaluation process is to be carried out by the co-located team (NHSL Project Team and all advisers) at the Project Office, 56 Canaan Lane, Edinburgh wherever possible;
- Details of the Bidder's submissions should not be discussed outwith members of the Evaluation Team at any time;
- Discussions on Bidders' submissions should only take place in secure areas e.g. project / adviser offices;
- Hard copies of Bidders' Submissions should not be removed from secure areas;
- A dedicated and secure room will be provided within the Project Office for storage of all documents / material received or prepared in connection with the competitive dialogue and final tender evaluation process. Key access will be strictly controlled.
- Electronic copies of Bidders' Submissions or evaluation material should not be transmitted electronically via email or other means to anyone outwith the Evaluation Team. Appropriate protections, for example use of password protected documents, server areas and personal computers are essential and should be used for all evaluation material stored electronically;
- When working on evaluation of Bidders' Final Tender Submissions, all computers should be locked when away from desks;
- No electronic copies should be made of Bidders' Submissions and no electronic documentation / information is to be taken off site (from the Project Office); and
- Where competitive dialogue and/or final tender evaluation material / notes are being disposed of, this should be done by means of shredding in the first instance then through confidential waste.

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Appendix A – Evaluation Responsibilities Table

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Appendix B – Information Flow and Communications during Dialogue

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Appendix C – Template Draft Final Tender Report

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Appendix D – Draft Final Tender Evaluation Proforma

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Appendix E – Final Tender Evaluation Proforma

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Appendix F - Final Tender Evaluation Scoring Matrix

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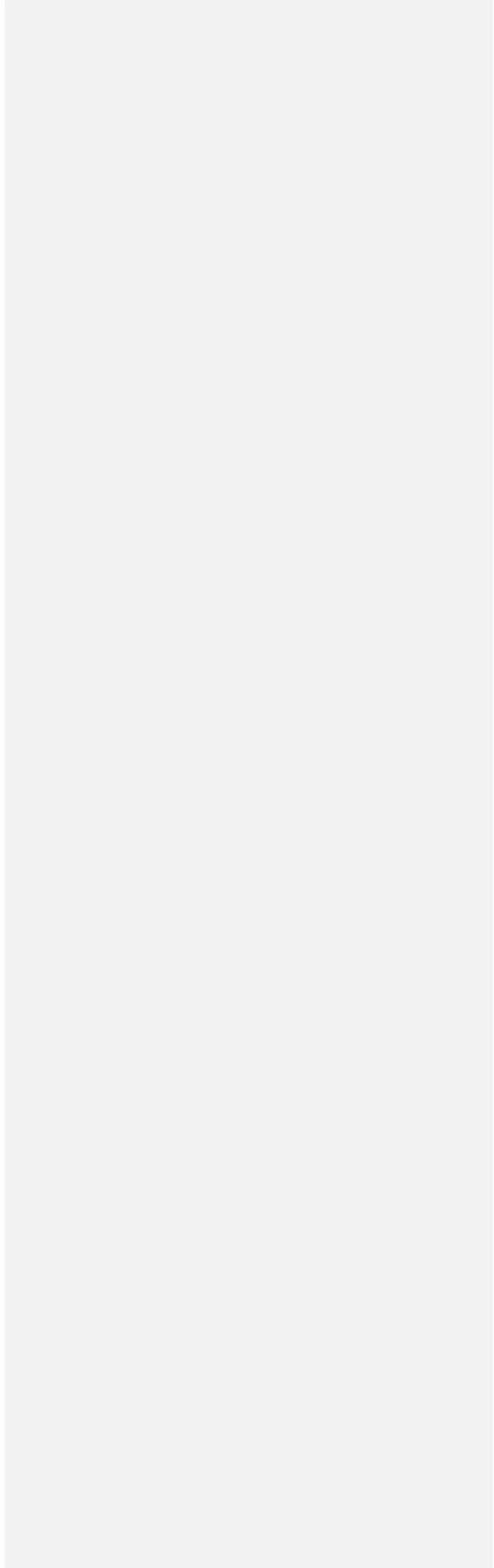
Appendix G – Confidentiality Form (to be completed by all Evaluators)

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[Appendix H – Protocol for Storage and Management of Files](#)

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Appendix I – Design Deliverables and Specifications

<u>Appendix</u>	<u>Design Deliverables</u>
<u>AP1.1</u>	<p>Bidders shall provide the following design submission requirements (as given in the Volume 1 of the ITPD):</p> <p><u>1. Project Overview</u></p> <p><u>1.1 - Bid Drawings Schedule</u></p> <p><u>2. Approach to Design & Construction - Architectural & Landscaping Design</u></p> <p><u>2.1 - Architectural Drawings Schedule</u></p> <p><u>2.2 - Outline Architectural Specification supporting the design concept and setting out the proposed materials, finishes and components to be used. Outline Specification shall be included for all components as detailed in the BCIS Elemental Analysis</u></p> <p><u>2.3 - Development Control Plan</u></p> <p><u>2.4 - 1:1000 Site Plans</u></p> <p><u>2.5 - 1:500 Location/Site Plan</u></p> <p><u>2.6 - 1:200 Site Layouts</u></p> <p><u>2.7 - Landscaping Proposal Specifications</u></p> <p><u>2.8 - Landscaping Proposal Drawings</u></p> <p><u>2.9 - 1:200 Architectural general arrangement floor plans, sections and elevations</u></p> <p><u>2.10 - 1:500 Architectural departmental adjacencies</u></p> <p><u>2.11 - 1:100 Architectural elevations including building elevation/facade showing appropriately rendered:-fenestration, exterior materials, louvers and cast shadows</u></p> <p><u>2.12 - 1:100 Architectural sections denoting floor to ceiling heights, suspended ceilings, raised access floors and floor levels</u></p> <p><u>2.13 - 1:100 Departmental and 1:50 room layouts</u></p> <p><u>2.14 - 1:200 Architectural drawings detailing (i) movement strategy, (ii) user flow diagrams at all principal circulation locations, (iii) movement interfaces and (iv) analysis of key nodal points.</u></p> <p><u>2.15 - 1:50 Architectural sections through Roof and Plant Room</u></p> <p><u>2.16 - 1:100 Architectural proposals relative to the clinical requirements and infection control.</u></p> <p><u>2.17 - 1:200 Architectural drawings in support of fire engineering proposals and how the proposals support the design concept and meet the requirements of the relevant code.</u></p> <p><u>2.18 - DDA Proposals including drawings, analysis and proposals.</u></p>

[2.19 - AEDET assessment drawings](#)
[2.20 - 1:50 Architectural design response detailing interfaces with existing RIE](#)
[2.21 - 1:100 Architectural drawings and visualisations for the Pod proposals](#)
[2.22 – 1:50 Architectural elevations and visualisations showing the Entrances](#)
3. Approach to Design & Construction - Interior Design Proposals
[3.1 - Quality, appropriateness and proposals for RHSC interior design supported by architectural drawings of how the layout and the design proposed addresses:](#)
[3.1.1 - Signage](#)
[3.1.2 - Patient, communal and public areas](#)
[3.1.3 - Appropriateness of facilities for users](#)
[3.2 - Loaded 1:50 room layout drawings for the RHSC indicating interior design proposals and demonstrating the coordinating aspects of all design disciplines, including floors, walls, ceilings, façade ventilation, mechanical and electrical services.](#)
[3.3 - Quality, appropriateness and proposals for DCN interior design supported by architectural drawings of how the layout and the design proposed addresses:](#)
[3.3.1 - Signage](#)
[3.3.2 - Patient, communal and public areas](#)
[3.3.3 - Appropriateness of facilities for users](#)
[3.4 - Loaded 1:50 room layout drawings for the DCN indicating interior design proposals and demonstrating the coordinating aspects of all design disciplines, including floors, walls, ceilings, façade ventilation, mechanical and electrical services.](#)
[3.5 - Internal Perspectives at eye level that demonstrate form and setting of the key internal architectural areas, distinguishing or innovative features which demonstrate the design quality of the proposals](#)
[3.6 – Drawings and visualisations to demonstrate the integration of Artwork into the interior design concept.](#)
[3.7 – Sample boards to demonstrate the proposed interior finishes, colour and textures. Boards to include RHSC and DCN wards, the Pod, Atrium and CAMHS.](#)
4. Approach to Design & Construction - Civil & Structural Proposals
[4.1 - Structural Drawings Schedule](#)
[4.2 - Civil Engineering Drawings Schedule](#)
[4.3 - Outline Structural Specification supporting the design concept including proposed materials and components to be used. Outline](#)

Specification shall be included for all components as in accordance with the NBS Specification

4.4 - 1:500 Site plan layout indicating all manholes, gully positions for all site drainage

4.5 - 1:500 Site plan layout indicating all positions for surface water drainage

4.6 - 1:500 Site plan layout indicating all positions for foul water drainage

4.7 - 1:500 Site plan layout indicating all positions for water mains

4.8 - 1:500 Site plan layout indicating all positions for roads, footpaths and finished levels

4.9 - 1:100 structural general arrangement foundation plans

4.10 - 1:100 structural general arrangement plans including floor and roof plans indicating all column and beam locations and sizes and all structural elements

4.11 - 1:100 structural sections through the building showing structural elements and service zones

4.12 - Confirmation of Geotechnical surveys, reports, studies undertaken in addition to the Geotechnical survey in the data room

4.13 - Confirmation of other site surveys, reports, studies undertaken in addition to the information already located in the data room

4.14 - Confirmation of any vibration monitoring / prevention proposals.

4.15 - 1:100 drawings for Helipad

4.16 - Outline Structural Specification supporting the Helipad design concept including proposed materials and components to be used. Outline Specification shall be included for all components in accordance with the NBS Specification

5. Mechanical & Electrical Services

5.1 - Building services (mechanical) drawings schedule

5.2 - Building services (electrical) drawings schedule

5.3 - Outline Building services (mechanical) Specification supporting the design concept including proposed materials and components to be used. Outline Specification shall be included for all components in accordance with the NBS Specification

5.4 - Outline Building services (electrical) Specification supporting the design concept including proposed materials and components to be used. Outline Specification shall be included for all components in accordance with the NBS Specification

5.5 - 1:500 site plan layout indicating all mechanical services , utilities supplies, natural gas mains, water supply and fire mains

5.6 - 1:500 site plan layout indicating all electrical utilities supplies, electrical

mains, data and communications ducts

5.7 - 1:200 internal services concept schematic and zoning plans for both heating and ventilation; indicating of heating and ventilation in each room

5.8 - 1:100 mechanical general arrangement floor plans showing extent of services, distribution routes, mechanical plant acoustic treatment, plant areas, etc

5.9 - Mechanical schematic layouts and report (co-ordinated and consistent with all drawings and design information contained within the Bid Submission Requirements) denoting details and extent of proposed :

5.9.1 - Plant strategy

5.9.2 - Distribution strategy

5.9.3 - Incoming gas and water services (including metering and sub-metering)

5.9.4 - Environmental design considerations

5.9.5 - Heat sources

5.9.6 - Natural Ventilation strategy

5.9.7 - Mechanical Ventilation strategy

5.9.8 - Mechanical cooling

5.9.9 - Mechanical air conditioning

5.9.10 - Specialist ventilation strategy

5.9.11 - Domestic hot and cold water system

5.9.12 - Space Heating System

5.9.13 - Space Cooling System

5.9.14 - Building Energy and Management System

5.9.15 - Dry Risers

5.9.16 - Soil and Waste System (above and underground)

5.9.17 - Rainwater pipework and distribution

5.9.18 - Specialist drainage

5.9.19 - Sanitary ware and appliances

5.9.20 - Dry Risers

5.9.21 - Natural Gas Installations including Laboratory Gases

5.9.22 - Medical Gas Installations

5.9.23 - Pneumatic Tube System

5.9.24 - Mechanical Commissioning Strategy

5.10 - 1:100 electrical general arrangement floor plans showing extent of services, distribution routes, plant areas, etc

5.11 - Electrical schematic layouts and report (co-ordinated and consistent with all drawings and design information contained within the Bid Submission Requirements) denoting details and extent of proposed:

5.11.1 - Incoming electrical services

<p>5.11.2 – Metering and Sub-metering</p> <p>5.11.3 - Mains distribution including standby generation facilities</p> <p>5.11.4 - Earthing, Bonding and Lightning protection</p> <p>5.11.5 - Containment systems</p> <p>5.11.6 - Small power installation</p> <p>5.11.7 – Lighting and Emergency Lighting</p> <p>5.11.8 - Specialist lighting</p> <p>5.11.9 - Lighting control systems</p> <p>5.11.10 - Uninterruptible Power Supplies</p> <p>5.11.11 - Telecommunications and I.T.</p> <p>5.11.12 - Nurse Call System</p> <p>5.11.13 - Fire Detection and Suppression System</p> <p>5.11.14 - Staff Attack / Induction Loop</p> <p>5.11.15 - Security system</p> <p>5.11.16 - Access Control system</p> <p>5.11.17 - CCTV system</p> <p>5.11.18 - Public address system</p> <p>5.11.19 - Digital TV and Radio Installation</p> <p>5.11.20 – Patient / Equipment Tagging</p> <p>5.11.21 – Induction Loop</p> <p>5.11.22 – Bedhead Services</p> <p>5.11.23 - Electrical Commissioning Strategy</p> <p>5.12 - 1:50 mechanical and electrical services sections to illustrate use of ceilings, natural daylight, ventilation strategies, cooling and heating strategies, lighting strategy, acoustic strategy, specialist installations strategy, services concept</p> <p>6. Lift Provisions</p> <p>6.1 - Lift and Escalator Drawings Schedule</p> <p>6.2 - Outline Building Services (lift and escalator provision) Specification supporting the design concept including proposed materials and components to be used. Outline Specification shall be included for all components in accordance with the NBS Specification. Traffic flow analysis to be included.</p> <p>7. Environmental Services and Energy Management Strategy</p> <p>7.1 - Natural Ventilation drawings and proposals</p> <p>8. Fire Strategy</p> <p>8.1 - 1:100 Fire Strategy drawings in support of fire engineering proposals and how the proposals support the design concept and meet the requirements of the relevant code.</p> <p>8.2 - Outline Fire Strategy Specification supporting the design concept</p>

	<p><u>including proposed materials and components to be used. Outline Specification shall be included for all components in accordance with the NBS Specification</u></p> <p><u>9. Security Strategy</u></p> <p><u>9.1- 1:100 Security drawings in support of security strategy and how the security proposals support the design concept</u></p> <p><u>9.2 - Outline Security Specification supporting the design concept including proposed materials and components to be used. Outline Specification shall be included for all components in accordance with the NBS Specification</u></p> <p><u>10. Acoustic Strategy</u></p> <p><u>10.1 - Outline Acoustic Specification supporting the design concept including proposed materials and components to be used. Outline Specification shall be included for all components in accordance with the NBS Specification</u></p> <p><u>11. Adaptability, Flexibility and Expandability Strategy</u></p> <p><u>11.1 - Architectural adaptability drawings in support of the overall adaptability strategy.</u></p> <p><u>11.2 - Strategy and drawings showing how the design of the new RHSC and DCN demonstrates innovation, flexibility, consideration of whole life design and is capable of absorbing reasonable change in the future without excessive public, patient or clinical disruption.</u></p>
<u>AP1.2</u>	<p><u>Specifications</u></p> <p><u>Bidders shall provide specific details on their proposed suite of specifications for the Works. These details shall include, but not be limited to the following:</u></p> <ul style="list-style-type: none"> <u>i. The industry recognised specifications proposed, with specific commentary on the extent of application of those to each main discipline (civil / structural, M&E, architectural etc);</u> <u>ii. Inclusion of either Project specific specifications for each main discipline, or example specifications used on other projects that are representative of the level of detail and clearly demonstrate the proposed level of quality that will apply to this scheme: and</u> <u>iii. A statement confirming that all such specifications (including fully completed framework specifications) will be fully drafted by the Preferred Bidder prior to Financial Close.</u> <p><u>For the avoidance of doubt, the Board is expecting Bidders to adopt both general, and where required, specific specifications to cover all</u></p>

	<p><u>components, materials, workmanship etc. For example the NBS framework could be utilised for mainstream building elements, however may need to be supplemented by specific standards and specifications relevant to particular Bidder proposals (e.g. piling, steelwork erection, infrastructure works).</u></p>
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Appendix J – Glossary

[To be reviewed and updated as necessary]

Term	Meaning
"Bidder"	<u>B3 (referred to as Bidder A); Integrated Health Solutions (Lothian) referred to as Bidder B); and 1.1.1 Mosaic (referred to as Bidder C)</u>
"Board"	means Lothian NHS Health Board (usually written as NHS Lothian) which is the common name of Lothian Health Board;
"Construction Contractor"	means the design and build contractor or contractors to be appointed by Project Co in respect of the Project;
"DBFM Contract"	means the project agreement to be entered into between the Board and Project Co in relation to the design, construction, financing and maintenance of the Project;
"FM Service Provider"	means the entity or entities to be appointed by Project Co to provide the facilities management in respect of the Project;
"NPD"	Means non-profit distributing
"Project"	means the design, build, finance and maintenance of a joint building to re-provide the Royal Hospital for Sick Children, Child and Adolescent Mental Health Service and the Department of Clinical Neurosciences on the Royal Infirmary of Edinburgh campus at Little France;
"Project Co"	means the special purpose company to be formed to enter into the DBFM Contract to design, build, finance and maintain the Project;
"PPP"	includes NPD, PFI and other similar initiatives utilising similar financing methods;
"SFT"	means Scottish Futures Trust Limited, having a registered office at 1 st Floor, 11-15 Thistle Street, Edinburgh EH2 1DF
"Investor"	means any organisation which is to subscribe for or lend a share of subordinated debt or mezzanine finance in or to Project Co once it is incorporated.

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Appendix A – Technical Evaluation Responsibilities Table

SECTION	QUALITY EVALUATION CRITERIA		SCORING PASS / FAIL or % weight (of total cost + quality)	EVALUATION TEAM	
				NHSL (Lead in bold)	Advisers
A – Executive Summary					
			Not scored		
B – Strategic and Management Approach (5% of overall evaluation; 12.5% of quality)					
	B1	Clarity, robustness and quality of understanding of policy framework and approach to addressing these.	0.16	IG , BC, JKS, JMackK	Technical and Legal
	B2	Clarity, robustness and quality of approach to contribution to delivering the Board's 'vision' and associated performance management regime	0.32	IG , BC, JKS, JMackK, S Davidson	Technical and Legal
	B3	Clarity, robustness and quality of understanding of Project outcomes and approach to contribution of delivering these	0.57	IG , BC, JKS, JMackK	Technical, Legal and Financial
	B4	Clarity, robustness and quality, of approach to partnership and collaborative working with the Board and its partners	0.81	IG , BC, JKS, JMackK	Technical and Legal
	B5	Clarity, robustness and quality of approach to staff development including recruitment, training, induction and HR issues	0.32	IG , BC, JKS, JMackK R Kelly, A Joyce, H Royston	Technical and Legal
	B6	Clarity, robustness and quality of approach to delivering community benefits	0.32	IG , BC, JKS, JMackK, RK, AJ	Technical and Legal
	B7	Clarity, robustness and quality of approach to integration of design with facilities management considerations	0.32	JKS , JMackK, BC, HR	Technical
	B8	Clarity, robustness and quality of approach to consortia management arrangements including approach to sub contractors	0.57	IG , BC, JKS, JMackK	Technical and Legal
	B9	Quality of proposed personnel	0.32	IG , BC, JKS, JMackK	Technical, Legal and Financial
	B10	Clarity, robustness and quality of approach to continuity throughout the Project	0.32	IG , BC, JKS, JMackK	Technical, Legal and Financial
	B11	Acceptable organisational diagrams for each stage of Project	PASS / FAIL	IG , BC, JKS, JMackK	Technical, Legal and

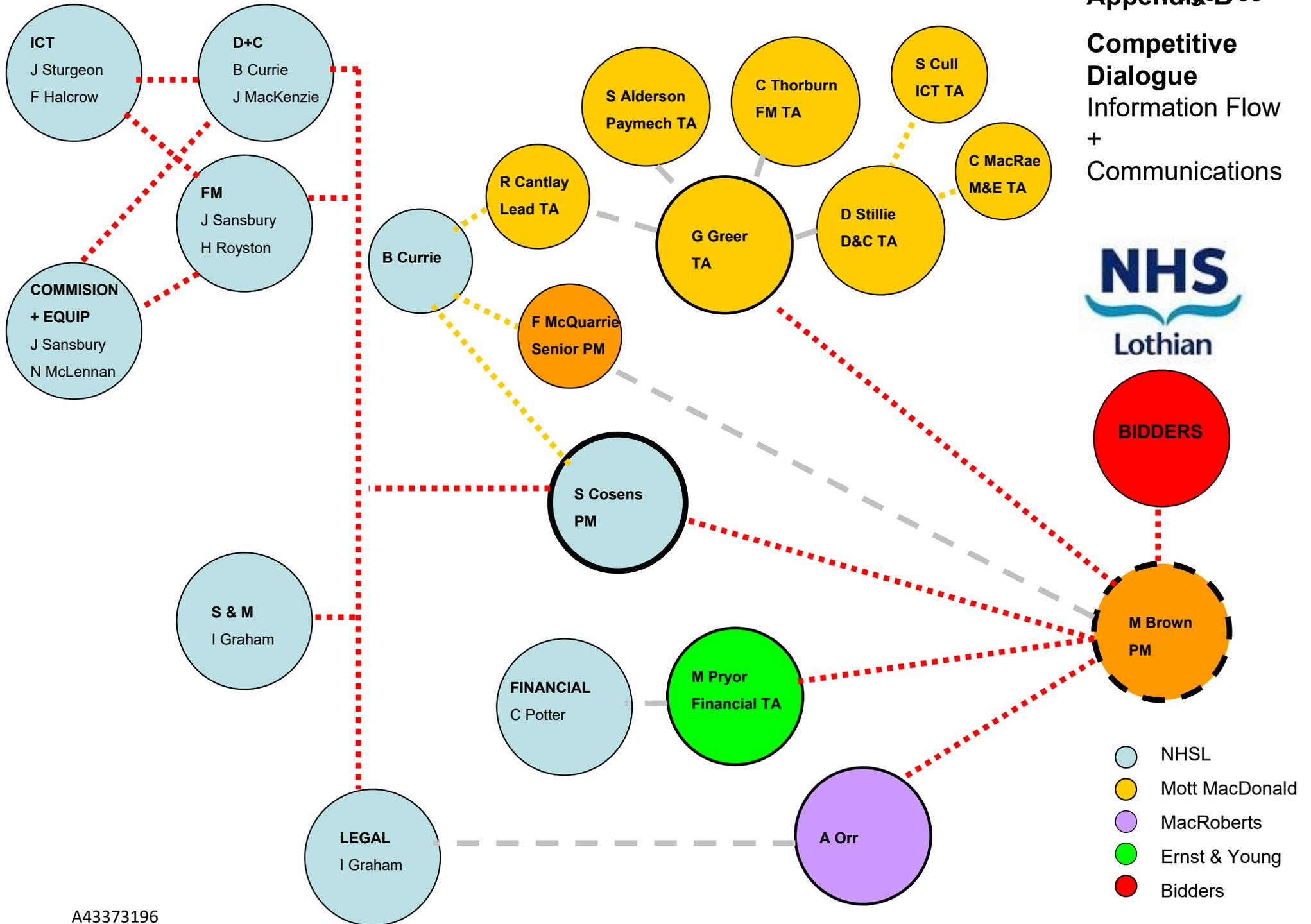
SECTION	QUALITY EVALUATION CRITERIA		SCORING PASS / FAIL or % weight (of total cost + quality)	EVALUATION TEAM	
				NHSL (Lead in bold)	Advisers
					Financial
	B12	Clarity, robustness and quality of approach to health and safety	0.81	IG , BC, JKS, SD, E Drennan	Technical and Legal
	B13	Acceptable approach to environmental, quality and health and safety management systems	PASS / FAIL	IG , BC, JKS, SD, HR, ED	Technical and Legal
	B14	Clarity, robustness and quality of approach to management of design development including integration with the Board and its partners	0.16	IG , BC, JKS, JMack	Technical
	B15	Acceptable programme from appointment as Preferred Bidder to Financial Close	PASS / FAIL	IG , BC, JKS, JMack	Technical, Legal and Financial
C – Design and Construction (23% of overall evaluation; 57.5% of quality)					
	C1	Clarity, robustness and quality of approach to meeting the stakeholders requirements in their design	2.64	JMack , BC, J Steers, F Halcrow, Infection Control	Technical
	C2	Clarity, robustness and quality of approach to design quality	1.85	BC , JMack, JS, FH, IC	Technical
	C3	Clarity, robustness and quality of architectural and landscape design	2.64	BC , JMack, JS, FH, IC	Technical
	C4	Clarity, robustness and quality of approach to delivering innovation	2.64	BC , JMack, JS, IG, JKS, FH, IC, N McLennan	Technical
	C5	Clarity, robustness, and quality of approach to adaptability and flexibility	2.64	BC , JMack, JS, FH	Technical
	C6	Clarity, robustness and quality of way finding and signage proposals	1.06	JMack , BC	Technical
	C7	Clarity, robustness and quality of interior design proposals	2.64	JMack , BC, IC	Technical
	C8	Clarity, robustness and quality of M&E engineering design proposals	1.06	BC , E Bain	Technical
	C9	Clarity, robustness and quality of natural and artificial lighting proposals	1.06	BC , JMack, EB	Technical
	C10	Clarity, robustness and quality of energy management proposals	1.85	BC , EB	Technical

SECTION	QUALITY EVALUATION CRITERIA		WEIGHT % of total (cost + quality)	EVALUATION TEAM	
				NHSL (Lead in bold)	Advisers
	C11	Clarity, robustness and quality of equipment proposals	1.06	JMacK , BC, NMcL, JS, JKS	Technical
	C11A	Compliance with Minimum Level of Group 1 Equipment	PASS / FAIL	JMacK , BC, NMcL, JS	Technical
	C12	Compliance With Mandatory Reference Design Requirements	PASS / FAIL	JMacK , BC, FH	Technical
	C13	Acceptable approach to achieving planning permission	PASS / FAIL	BC , JMacK	Technical
	C14	Acceptable vertical and horizontal movement strategy	PASS / FAIL	BC , JMacK, IC, HR, JKS, C Armstrong	Technical
	C15	Acceptable ICT strategy	PASS / FAIL	BC , JMacK, FH, J Sturgeon, W Clemitson	Technical
	C16	Acceptable fire planning strategy	PASS / FAIL	BC , JMacK, HR, SD, CA	Technical
	C17	Acceptable structural design proposals	PASS / FAIL	BC , EB	Technical
	C18	Acceptable services, utilities and infrastructure proposals	PASS / FAIL	BC , EB	Technical
	C19	Acceptable approach to achieving required BREEAM rating	PASS / FAIL	BC , HR, EB	Technical
	C20	Acceptable post Preferred Bidder stage design development proposals and design programme	PASS / FAIL	BC , JMacK, FH, NMcL	Technical
	C21	Compliance with Board's Construction Requirements	PASS / FAIL	BC , JMacK, FH, NMcL	Technical
	C22	Acceptable design life proposals	PASS / FAIL	BC , EB, HR	Technical
	C23	Acceptable construction programme and approach to monitoring	PASS / FAIL	BC , JKS	Technical
	C24	Clarity, robustness and quality of construction methodology	1.85	BC , EB, IC	Technical

SECTION	QUALITY EVALUATION CRITERIA		WEIGHT % of total (cost + quality)	EVALUATION TEAM	
				NHSL (Lead in bold)	Advisers
	C25	Acceptable approach to commissioning and handover	PASS / FAIL	JKS , BC, JMacK, SD, FH, NMcL	Technical
	C26	Acceptable approach to quality and environmental management systems	PASS / FAIL	IG , BC, JMacK, JKS, SD, HR, EB	Technical
	C27	Acceptable approach to health and safety management	PASS / FAIL	IG , BC, JKS, SD, HR, ED, IC	Technical
	C28	Acceptable approach to compliance with CDM regulations	PASS / FAIL	IG , BC, SD, ED	Technical
	C29	Robustness of technical costs	PASS / FAIL	BC , LA	Technical
	C30	Acceptable list of summary assumptions, clarifications and derogations	Not scored	BC , JKS, IG, JmacK	Technical
	C31	Acceptable Interface Proposals	PASS / FAIL	BC , JKS, IG	Technical, Legal and Financial
D – Approach to Facilities Management (12% of overall evaluation; 30% of quality)					
	D1	Clarity, robustness and quality of approach to management and administration of the Services and Contract	2.50	JKS , SD, HR	Technical
	D2	Acceptable approach to integration with Board policies and operation	PASS / FAIL	JKS , SD, HR	Technical
	D3	Acceptable approach to ensuring quality management	PASS / FAIL	JKS , SD, HR	Technical
	D4	Acceptable approach to ensuring environmental management	PASS / FAIL	JKS , SD, HR	Technical
	D5	Acceptable approach to ensuring health and safety management	PASS / FAIL	JKS , SD, HR	Technical
	D6	Acceptable approach to interfacing with the Board for undertaking works outside of access times	PASS / FAIL	JKS , SD, HR	Technical
	D7	Clarity, robustness and quality of approach to partnership and resources including liaison, resources and supply chain management	2.50	JKS , SD, HR	Technical
	D8	Acceptable approach to business continuity planning	PASS / FAIL	JKS , SD, HR	Technical

SECTION	QUALITY EVALUATION CRITERIA		WEIGHT % of total (cost + quality)	EVALUATION TEAM	
				NHSL (Lead in bold)	Advisers
	D9	Acceptable fire safety policies and procedures	PASS / FAIL	JKS , SD, HR, JMack, Fire Officer	Technical
	D10	Clarity, robustness and quality of approach to performance and information management including; Helpdesk, programme maintenance lifecycle, performance monitoring, monitoring and records, regular reports and information requests, building services and statutory testing	4.50	JKS , SD, HR	Technical
	D11	Acceptable approach to un-programmed maintenance	PASS / FAIL	JKS , SD, HR, JMack	Technical
	D12	Clarity, robustness and quality of approach to service elements including; utilities management and grounds maintenance services	2.50	JKS , SD, HR	Technical
	D13	Robustness of technical costs	PASS / FAIL	BC , JKS, SD, LA	Technical
	D14	Acceptable list of summary assumptions, clarifications and derogations	Not scored	BC , JKS, IG, JMack, SD	Technical
	D15	Acceptable approach to mobilisation of Facilities Management services	PASS / FAIL	JKS , SD, HR, RK, AJ	Technical

Competitive Dialogue Information Flow + Communications



**Re-provision of RHSC and DCN
at
Little France**

Draft Tender Executive Summary

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1. Important Notice 1
2. Introduction 2
3. Key points to be addressed from Draft Tender 3
Part A Technical Commentary (comments to be recorded by exception for each of the criteria). 4
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CONFIDENTIAL

1. Important Notice

- 1.1** [This Executive Summary has been prepared in accordance with the process as set out in the Invitation To Participate in Dialogue (the "ITPD") which, of itself, is being conducted within the terms set out in the ITPD. This Executive Summary, the ITPD documents and any other subsequent communications are confidential to the Bidder and the Board. The Bidder, its representatives, advisers, consultants, contractors, servants and/or agents are advised that the terms of the Confidentiality Undertaking as signed and submitted by the Bidder on or before [DATE] apply, which, inter alia, prohibits disclosure of any information (as therein defined). Any failure to comply with the terms of the Confidentiality Undertaking shall entitle the Board to disqualify the relevant Bidder.
- 1.2** Without prejudice to terms of the ITPD, neither the Board, nor its Advisers shall have any liability or responsibility in relation to the accuracy, adequacy or completeness of such information or any statements made in this Executive Summary. Neither shall they incur any liability or responsibility arising out of or in respect of the Consultation Process. For the avoidance of doubt, the Bidder should not assume that such information or statements provided during the course of the Consultation Process will remain unchanged.
- 1.3** No information provided in this Executive Summary purports to be comprehensive or to have been independently verified. Nothing detailed in this Executive Summary shall be construed as technical, legal, financial or tax advice.
- 1.4** The Board reserves the right to amend its requirements and this process, in accordance with the ITPD.
- 1.5** The Board shall not be obliged to appoint any of the Bidders to undertake the Project and the Board reserves the right not to proceed with the award process and to withdraw from the procurement procedure, or any part thereof, at any time.]

2. Introduction

- 2.1** In accordance with Section 4.6.2 of the ITPD Volume 1 the Board identifies, in this Executive Summary, the issues which the Board requires the Bidder to address in further developing its proposed solution(s) or as part of its Tender.
- 2.2** The Bidder is reminded that whilst the Board has not evaluated the Draft Tender, it has reviewed and commented on it in order to assist the Bidder in developing its proposal.
- 2.3** The Bidder is reminded of the requirements of Section 4.8 (Final Tender) and 4.9 (Submission requirement for the Draft Final Tender and Final Tender) of the ITPD Volume 1 with regard to Submission of Final Tenders.

3. Key points to be addressed from Draft Tender

3.1 [To be completed on receipt of individual Bidder submissions]

Part A Technical Commentary (comments to be recorded by exception for each of the criteria).

Part B Financial and Insurance Commentary

Part C Legal Commentary

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C1. Clarity, robustness and quality of approach to meeting the stakeholders requirements in their design
Quality Evaluation Basis	Scored
Quality Evaluation Criteria Weighting	2.64
Pre-Score Pass/Fail Outcome	
Submission Ref	C1.1

The Bidders must submit proposals setting out their approach to meeting the stakeholders requirements in their design.

For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:

- i. Evidence that they are sensitive to the co-location of the RHSC and DCN and that they will take advantage of this arrangement to maximise their design;
- ii. Evidence that they are aware of the wide range of stakeholders associated with these departments and that they understand and will cater for all their requirements in their design;
- iii. Evidence that their bid will deliver a nurturing, engaged and safe community that supports the well being of all patients, carers, families, visitors and staff;
- iv. Evidence that their design will provide a healing environment that will assist the Board in its core obligation to deliver clinical care to users of both the RHSC and DCN;
- v. Evidence that their design will include particular consideration of the proposed external spaces, therapy gardens and landscaping, communal patient areas for example quiet and television rooms, public areas;
- vi. Evidence that their design will adequately address security requirements;
- vii. Evidence that their design will fully incorporate infection control requirements and HAI Scribe; and
- viii. In particular for the RHSC and CAMHS, we would expect the Bidders to demonstrate how the design will be developed to achieve:
 - i. Facilities that are a beautiful place with children and young people at the centre of a nurturing, engaged and safe community;
 - ii. Facilities that are reassuring, relaxing, convenient and safe with the needs of children and young people and those with disabilities expressly addressed; and
 - iii. Facilities that provide an appropriate balance of internal and external play areas.

In relation to the DCN, we would anticipate Bidders shall demonstrate how similar qualities to the above (ix (i – iii) but also in addition, how the design will be developed to achieve a nurturing, quiet and relaxing environment for its patients.

Submission Requirement

Lead Reviewer(s):
Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary

Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C2. Clarity, robustness and quality of approach to design quality
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 1.85
 Pre-Score Pass/Fail Outcome:

Bidders must submit proposals setting out their approach to achieving design quality. This must be provided as set out in C2.1 – C2.3 below:

- Submission Ref** C2.1
 Bidders must submit proposals setting out how the design will be developed to integrate the architectural, mechanical, electrical and civil and structural engineering aspects of the design to present a cohesive innovative design which meets all the Board's construction and stakeholders' requirements (including infection control and HAI Scribe requirements). The submission shall utilise all Mandatory Reference Design Requirements to deliver a solution across all disciplines.
- Submission Requirement**
- Submission Ref** C2.2
 Bidders must submit proposals setting out their design analysis of both the site and the Board's requirements as depicted in the Board's Construction Requirements. The review of the site shall identify, as a minimum, opportunities, constraints and access and planning issues.
- Submission Requirement**
- Submission Ref** C2.3
 Bidders must submit proposals setting out a clear statement summarising what they understand to be the key strategic issues relating to the project and demonstrate how the design proposals have dealt with these specific project issues, and any impact their proposals will have on such matters.
- Submission Requirement**

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			5	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.

	NOT SCORED AT DRAFT FINAL TENDER	6-7	The Bidder's approach: <ul style="list-style-type: none"> • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9	The Bidder's approach: <ul style="list-style-type: none"> • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10	The Bidder's approach: <ul style="list-style-type: none"> • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C3. Clarity, robustness and quality of architectural and landscape design
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.64
 Pre-Score Pass/Fail Outcome:

Bidders must submit proposals setting out their approach to architecture and landscape design. This should be provided as set out in C3.1 – C3.3 below:

Submission Ref: C3.1
 Bidders must submit proposals setting out their approach to architecture design. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:

- i. How the design will deliver world class architectural design practice in delivering Facilities that support the Board’s clinical needs and a design which provides a high level of creativity;
- ii. How the design will provide an ordered composition of building elements in a stimulating form that successfully combines good standards of space, height, form, scale and use of materials and colours / images with associated functional requirements and the surroundings;
- iii. How the design will address the interests of stakeholders, including (but not limited to) clinicians, patients (and their representatives, families and carers), health commissioners, Local Government, and the local community;
- iv. How the design will deliver architectural quality and demonstrates how this will be provided;
- v. How the design will deliver the lines of sight and views from windows which are suitable for children and young people;
- vi. How the design will provide age and ability appropriate art and way finding design which is integrated into the design solution;
- vii. How the design will fully consider all aspects of safety in all areas and a description of how risks have been removed through design innovations;
- viii. How the design will fully address control of infection and HAI Scribe; and
- ix. How the design will minimise cleaning and maintenance of all elements of the Facilities by choice of materials, layout and orientation and shows how such activities can be carried out safely and without disruption to clinical activities.

Submission Ref: C3.2
 Bidders must submit proposals demonstrating how they will deliver high quality architectural buildings, and high quality finishes and component parts. As well as the architectural drawings and supporting information, Bidders shall provide specific details in detailed specification format to include the following:

- i. Internal and external doors and door furniture, also showing proposed pattern of vision panels;
- ii. Washing and toilet facilities;
- iii. Reception desks and touchdown bases;
- iv. Communal patient areas, which include spaces such as playrooms, television rooms and quiet rooms
- v. External therapy gardens and external covered play and seating areas
- vi. Floor and wall coverings;
- vii. Natural and artificial lighting particularly in key public areas, artwork and key clinical areas such as theatres;
- viii. Samples of worktops and wall cupboards shall be provided for approval by the Board; and
- ix. Juxtaposition of main external finishes / cladding.

Submission Ref: C3.3
 Bidders must submit proposals setting out their approach to external hard and soft landscaping (including courtyards and therapy gardens) which shows how the design will be developed for therapeutic use and how it provides patient and staff access and how it enhances the environment of the Facilities. The proposals should demonstrate how the principle elements of external landscaping will be designed. to:

- i. Complement the RHSC and DCN buildings and the neighbouring RIE;
- ii. Minimise the risk of vandalism and crime;
- iii. Facilitate security of pedestrians and avoided ‘no-go’ areas in their design. Ensure site safety and link with the Green Travel Plan;
- iv. Minimise maintenance and operation costs;
- v. Ensure easy maintenance and cleaning whilst minimising health and safety issues;
- vi. Provide appropriate fire safety routes for all users;
- vii. Incorporate SUDS and other sustainable features;
- viii. Incorporate art work; and
- ix. Incorporate lighting, heating, seating, canopy and wind protection arrangements which are appropriate for young children and less disabled people.

For indicative purposes only it is anticipated that Bidders proposals may include (but shall not necessarily be limited to) those items listed in (i) – (ix) above.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer’s Comment

ITPD Evaluation Proforma

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C3. Clarity, robustness and quality of architectural and landscape design

Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary	Overall Comment	Score	Scoring Guidance
		NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
			6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
			8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
			10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status	Review Stage	Reviewer	Date

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C4. Clarity, robustness and quality of approach to delivering innovation
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.64
 Pre-Score Pass/Fail Outcome:

Submission Ref: Bidders must submit proposals setting out their approach to delivering innovation. This should be provided as set out in C4.1 – C4.4 below:
 Submission Requirement: C4.1
 Bidders must submit proposals setting out where it will be, or has been possible to provide innovative solutions to meet the Board’s requirements. Innovation in design can range from whole concepts of hospital planning, distribution of functions etc to the building solution (e.g. use of prefabricated units) to detail design of components, materials, spaces, use of technology and art etc. Bidders must show how their design reflects current and developing innovations in healthcare delivery and construction generally and translate these into an innovative building solution.
 Submission Requirement: C4.2
 Bidders must submit proposals setting out how their design, using innovation, will optimise the sustainability of the Facilities. Bidders must provide details of their strategy to show how it will optimise energy, water and utility consumption, minimise waste production, implements a strategy to meet the Board’s BREEAM requirements including carbon reduction and other positive activities described in the Board’s Construction Requirements to provide a sustainable development.
 Submission Requirement: C4.3
 Bidders must submit proposals setting out how an innovative approach to the provision of ICT in the Facilities in line with the Board’s Construction Requirements and FM Output Specifications has been delivered.
 Submission Requirement: C4.4
 Where areas of innovation are identified Bidders must submit supporting evidence, where possible, with examples from other schemes where this has proved successful. Bidders must provide information to show the benefit, cost and risk for each innovation so the Board can assess them separately.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary	Overall Comment	Score	Scoring Guidance

<p>NOT SCORED AT DRAFT FINAL TENDER</p>	5	<p>The Bidder's approach:</p> <ul style="list-style-type: none"> • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
	6-7	<p>The Bidder's approach:</p> <ul style="list-style-type: none"> • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
	8-9	<p>The Bidder's approach:</p> <ul style="list-style-type: none"> • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
	10	<p>The Bidder's approach:</p> <ul style="list-style-type: none"> • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C5. Clarity, robustness, and quality of approach to adaptability and flexibility.
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.64
 Pre-Score Pass/Fail Outcome:
 Submission Ref: Bidders must submit proposals setting out their approach to adaptability and flexibility. This should be provided as set out in C5.1 and C5.2 below:
 C5.1
 Submission Requirement: Bidders must submit proposals setting out an adaptability strategy which shall describe what features have been incorporated to facilitate future adaptation of use and/or expansion, technological changes, changes in national policy, national and local planning, clinical advancement and seasonal or future strategic variations in use. It is expected that particular reference shall be made to potential changes in the delivery of surgical and radio diagnostic services given the rapid evolution of developments in these disciplines. All design disciplines i.e. architectural, mechanical and electrical, structural and environmental, must be considered.
 Submission Ref: C5.2
 Submission Requirement: Bidders must submit proposals setting out their approach to adaptability and flexibility. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:
 i. How the interior spaces may be re-arranged in future if a change of use were to occur;
 ii. How the building's services and external infrastructure have been designed to allow this adaptability;
 iii. How the building structure and envelope, services, partitioning, ceiling, and flooring systems and construction technique has been designed to allow this adaptability;
 iv. How the main electrical installations can accommodate changes over and above the 25% capacity increase (requested in Section 3 Board's Construction Requirements) with minimal structure disruption; and
 v. How the environmental services strategy will co-ordinate with the adaptability and flexibility strategy.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or + proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: + demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or + proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: + demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C6. Clarity, robustness and quality of way finding and signage proposals
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 1.06
 Pre-Score Pass/Fail Outcome:
 Submission Ref: C6.1

Bidders must submit proposals demonstrating their way finding strategy. For indicative purposes only it is anticipated that Bidders proposals may include (but shall not necessarily be limited to) how it has been developed to:

- i. Suit the needs of the particular patient mix for the Facilities i.e. children, young people and adults using different services, as well as staff and visitors;
- ii. Include internal and external signage and signage outside the site boundary relevant to the Facilities. External signage shall include proposals for the wider RIE site, pedestrians, vehicles and street signage;
- iii. Integrate with the art strategy and lighting strategy for the Facilities;
- iv. Take cognisance of patient journey times and take steps to minimise such journey times;
- v. Minimise the transmission of micro-organisms and separates clean and contaminated traffic and material streams;
- vi. Include hand hygiene signage;
- vii. Include no smoking signage;
- viii. Make reference to sample or exemplar site information provided by The Board; and
- ix. Make use of signage in the floor.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C7. Clarity, robustness and quality of interior design proposals
Quality Evaluation Basis	Scored
Quality Evaluation Criteria Weighting	2.64
Pre-Score Pass/Fail Outcome	
Submission Ref	<p>Bidders shall submit their interior design proposals. This must be provided as set out in C7.1 and C7.3 below:</p> <p>C7.1</p> <p>For both the RHSC and DCN sectors of the Facilities Bidders must submit proposals setting out how their design has been developed to include:</p> <ul style="list-style-type: none"> i. Interior design proposals and illustrations for each distinct area of the Facilities, paying particular attention to the interior design solutions for public, patient and key staff areas; ii. Communal patient areas that are light, spacious and provide a welcoming atmosphere and which are domestic in design and ambience with the main entrance being immediately apparent; iii. Public areas which are restful, open and well lit with natural light and have views out to landscaped spaces that add quality and orientation; iv. An open and friendly environment, that shall ensure privacy and dignity for patients, family members and visitors when required; v. The incorporation of art in the proposals. Bidders shall provide the name(s) of the artists whom will undertake the work; vi. Integration with their lighting strategy and equipment strategy; vii. Integration with maintenance, cleaning, operation and sustainability; viii. Integration with way finding and signage proposals and how the way finding and signage within the RHSC and DCN links with the way finding within the existing RIE; ix. How the interior materials within the Facilities match the furniture, furnishings and equipment being procured by the Board; and x. Facilities which have a safe and secure environment which is not created via visible security features e.g. security cameras. Safety in design shall also take consideration of anti-ligature, child safety, and Child and Adolescent Mental Health Service whilst maintaining access and ambience. <p>For indicative purposes only it is anticipated that Bidders proposals may include (but shall not necessarily be limited to) those items listed in (i) – (x) above.</p>
Submission Requirement	
Submission Ref	<p>C7.2</p> <p>Bidders must submit proposals setting out how their interior design for the RHSC has been developed to provide:</p> <ul style="list-style-type: none"> i. Age and ability appropriate signage throughout the Facilities; ii. A nurturing, relaxed and safe environment in the patient, communal and public areas; and iii. Furniture, windows and lines of sight which are appropriate for young children and children in pushchairs and wheelchairs
Submission Requirement	
Submission Ref	<p>C7.3</p> <p>Bidders must submit proposals setting out how their interior design submission for the DCN provides a nurturing, quiet and relaxed environment in the patient, communal and public areas.</p>
Submission Requirement	
Lead Reviewer(s):	
Support Reviewer(s):	

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C7. Clarity, robustness and quality of interior design proposals

Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	Confidential
Additional Information List here any additional information/clarifications to be sought.	

Summary	
Overall Comment	Score
	5
	6-7
	8-9
	10
NOT SCORED AT DRAFT FINAL TENDER	

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C8. Clarity, robustness and quality of M&E engineering design proposals
Quality Evaluation Basis	Scored
Quality Evaluation Criteria Weighting	1.06
Pre-Score Pass/Fail Outcome	
Submission Ref	C8.1 Bidders must submit proposals setting out their approach to M&E engineering services design. This must be provided as set out in C8.1 – C8.3 below:
Submission Requirement	Bidders must submit proposals setting out the engineering services design for each element of the scheme in sufficient detail to demonstrate compliance with the Board's Construction Requirements. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following: i. An engineering design, control and operational philosophy statement; ii. Details of principal M&E system selections; iii. The definition of plant areas and zones both internal and external to the Facilities; and iv. Schematics and written proposals for major plant provision.
Submission Ref	C8.2 Bidders must submit proposals setting out how their design will be developed to include the following: i. Building services which support the Board's business, safety and security and life critical services under supply failure scenarios. Specific details shall be provided relating to standby facilities and mains service redundancy; ii. An autonomous energy centre and associated plant; iii. How temperature, ventilation and comfort for occupants will be maintained in accordance with the minimum criteria and how, if possible, these criteria will be improved; iv. How the quality of the environment and prevention of sick building syndrome shall be ensured; v. How mechanical and electrical design is integrated with architectural, structural and civil aspects as outlined above in C2 and C4; vi. How sustainability has been incorporated into their design, including details of the maintenance and operation philosophy for all mechanical and electrical equipment; vii. Proposals for external services, including details of the main routes (including proposed connections to existing services), intakes and off-site reliance of these services and how this interfaces with adjacent sites (this is also discussed in C18 below); viii. Details of the main source of heating energy; and ix. Details of mechanical and electrical innovations including costs as described in C4.
Submission Requirement	The following information should be also be provided to help demonstrate the design proposals noted above, including: x. An environmental conditions / room provisions matrix for both mechanical and electrical services for each room in the Facilities; and xi. Major plant life cycle statements and design life, including an explanation of the Bidder's lifecycle philosophy to support the lifecycle costing analysis completed in the technical costs proforma;
Submission Ref	C8.3 Whilst Bidders are required to undertake their own design, the Board has provided a draft Environmental Matrix as part of the ITPD documentation. Bidders must confirm acceptance of the Board's Environmental Matrix, highlighting any proposed changes on an exception basis.
Submission Requirement	
Lead Reviewer(s):	
Support Reviewer(s):	

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C8. Clarity, robustness and quality of M&E engineering design proposals

Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
<p style="font-size: 2em; opacity: 0.3; transform: rotate(-30deg);">Confidential</p>	<p>NOT SCORED AT DRAFT FINAL TENDER</p>	5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C9. Clarity, robustness and quality of natural and artificial lighting proposals
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 1.06
 Pre-Score Pass/Fail Outcome:
 Submission Ref: C9.1

Appendix D

Bidder:

Submission Requirement: Bidders must submit proposals setting out their approach to natural and artificial lighting within the Facilities. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:

- The balance of natural and artificial light;
- How the environment created by the lighting design will support the well being of patients, carers, visitors and staff;
- How it will be functional for clinical use;
- How it will produce an aesthetically pleasing environment;
- How it will be co-ordinated with the building structure and how it will integrate with other areas e.g. mechanical and electrical design, interior design and architecture;
- How it will include sustainability and energy efficiency;
- How the interior lighting philosophy will include room usage and warning signs, night lighting, security emergency signage and emergency lighting, lighting control and wiring philosophy, standby lighting; and
- How the external lighting philosophy will minimise light pollution for the neighbours including the RIE, assist to minimise vandalism, assist to improve security, and take account of local residents' needs.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C10. Clarity, robustness and quality of energy management proposals
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 1.85
 Pre-Score Pass/Fail Outcome:
 Submission Ref: C10.1

Bidders must submit proposals setting out their approach to energy management. This should be provided as set out in C10.1 and C10.2 below.

Bidders must submit an energy model, complete with supporting information, demonstrating how their design solution will achieve an optimum level of energy and utility conservation (linked with the requirement for a sustainable development in C4) and show that their design fulfils the following:

- The building energy performance will achieve a minimum of 6 credits for ENE.01 in the BREEAM assessment.
- The water consumption for the Facilities will not exceed 170,000 litres/bed/annum (Part 6 Section 3: The Board's Construction Requirements);
- 20% of energy is provided by renewable energy sources (Part 6 Section 3: The Board's Construction Requirements); and
- The inclusion of passive design strategies for ventilation and thermal control. The environmental control system is to be co-ordinated and integrated with the design of the structure and the occupied areas in order to maximise the control and flexibility of the installations.

In addition Bidders must submit an analysis of their design solution which demonstrates energy consumption proposals along with cost estimates of specific measures or innovations to be introduced.

Submission Ref: C10.2

Submission Requirement: For information purposes only in addition to the model referred to above a dynamic thermal energy model is to be submitted which should comply with the parameters set out in Appendix F of the ITPD Volume 1.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
		The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements. 5
		The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements. 6-7
		The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements. 8-9
		The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements. 10
	NOT SCORED AT DRAFT FINAL TENDER	

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C11. Clarity, robustness and quality of equipment proposals
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 1.06
 Pre-Score Pass/Fail Outcome:
 Submission Ref: C11.1

Bidders must submit the following: :
 i. A commentary showing how the Group 1 Equipment scheduled by the Board varies from their own assessment of Group 1 Equipment needs. This shall be done by providing a mark-up of the Group 1 Equipment included in Equipment Schedule contained in Volume 3 of the ITPD. It should be noted that the quantity of Group 1 Equipment specified by the Board is considered to be a minimum;
 ii. A commentary on any aspect of the proposed equipment responsibilities regime suggested in paragraph 2.15 (Equipment) of the ITPD Volume 1. that is not considered to represent best value to the Board, and suggestions as to alternative profiles of responsibility, if any, that may enhance this;
 iii. A commentary setting out their proposals to select equipment suppliers and how the required level of quality is to be achieved in the equipment for which they will be responsible for supplying and any improvement in the level of quality being proposed. Samples of worktops and wall cupboards shall be provided for approval by the Board to support this; and
 iv. Their approach to working alongside the Board to allow the Groups 2A, 2B and 3 Equipment to be installed and how this process will be managed.

Submission Ref: C11.2
 Submission Requirement: Bidders must submit a fully priced Schedule of Group 1 Equipment, the total sum for which should be clearly identifiable in the Technical Cost Proforma requested at C29 below.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C11A Compliance with minimum level of Group 1 Equipment
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C11A.1
 Submission Requirement: Bidders must provide confirmation that they will comply with the minimum level of Group 1 Equipment as set out in the Equipment Schedule and Equipment Responsibility Matrix.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C12. Compliance With Mandatory Reference Design Requirements
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a

Submission Ref: C12.1
 Submission Requirement: Bidders must submit proposals demonstrating how their design complies with the Mandatory Reference Design Requirements.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C13. Acceptable approach to achieving planning permission
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: Bidders must submit proposals setting out their approach to achieving planning permission. This must be provided as set out in C13.1 and C13.2 below.
 Submission Requirement: Bidders must submit proposals demonstrating compliance including a methodology for achieving planning approval accordance with paragraph 2.17 of Volume 1 of the ITPD. This should include the following:
 i. Community requirements;
 ii. Policy of the local planning authority;
 iii. Development Framework requirements; and
 iv. "Good neighbourliness".
 Submission Ref: C13.2
 Submission Requirement: Bidders are required to (in conjunction with the Board) participate in planning consultation meetings with the City of Edinburgh Council regarding planning requirements. From these consultations Bidders must submit evidence to demonstrate that the granting of approvals for the scheme will be achieved in the Preferred Bidder stage and confirm any perceived obstacles / project risks (both known and unknown) in this regard shall be clearly drawn to the Board's attention.
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that the granting of approvals for the scheme will be achieved
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C14. Acceptable vertical and horizontal movement strategy
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: Bidders must submit proposals setting out their vertical and horizontal movement strategy. This must be provided as set out in C14.2 – C14.3 below. C14.1
 Submission Requirement: Bidders must submit proposals setting out a coherent strategy which shows how their design has been developed for managing different categories of traffic and materials within the Campus Site. This shall include the movement of people and vehicles and the distribution of supplies and waste and the separation of clean and contaminated traffic and materials during transportation, storage and at drop off points.
 Submission Ref: C14.2
 Submission Requirement: Bidders must submit proposals setting out how their design has been developed to minimise travel time and distances for patients, staff, and material transmission of micro-organisms either through airborne or other means to support and segregate a natural flow of pedestrian and vehicular traffic.
 Submission Ref: C14.3
 Submission Requirement: Bidders must submit proposals setting out how their design has been developed to include a strategy for the following:
 i. Wheelchair users, less able users and transportation of small children and babies that will use the Facilities;
 ii. Incorporation of fire fighting lift(s) to maintain evacuation use for the less able, small children and babies in an emergency situation; and
 iii. The route required by people and materials from the helipad, the RIE and the Facilities.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
		5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
	NOT SCORED AT DRAFT FINAL TENDER	6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C15. Acceptable ICT strategy and Bidders proposals, compliant with Board's requirements
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: Bidders must submit proposals setting out their approach to a compliant ICT strategy. This must be provided as set out in C15.1 – C15.4 below.
 Submission Requirement: C15.1 Bidders must submit proposals setting out their ICT strategy and demonstrating an understanding of the Board's requirements for information management and technology (M&T).
 Submission Ref: C15.2 Bidders must submit proposals setting out a detailed methodology demonstrating how it will ensure compliance with the Board's Construction Requirements, define clear interfaces of responsibility as necessary, and how they will take overall responsibility for the coherence and compatibility of systems such that they will operate to suit the Board's needs.
 Submission Requirement: C15.3 Bidders must submit proposals setting out the number, location size and specification of IT / communications rooms.
 Submission Ref: C15.4 Bidders must submit proposals setting out how the Board's routing, fire suppression, ventilation and connectivity to the RIE requirements has been specifically addressed.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C16. Acceptable fire planning strategy
Quality Evaluation Basis	Pass / Fail
Quality Evaluation Criteria Weighting	n/a
Submission Ref	C16.1
Submission Requirement	Bidders must submit proposals setting out their strategic fire strategy, demonstrating how the design will be developed to consider fire compartmentation and horizontal and vertical evacuation strategies.
Submission Ref	C16.2
Submission Requirement	<p>Bidders must submit proposals setting out how their fire planning strategy has been developed. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:</p> <p>i. The implications on staff and users in the event of a fire;</p> <p>ii. A clear understanding of the policies and principles underlying fire safety in NHS premises, compliance with NHS policies and principles and full agreement and coordination with Lothian and Borders Fire and Rescue Service, The CEC Council's Building Control Department and the Board's Fire Officer;</p> <p>iii. Compliance with: The Building (Scotland) Regulations 2004 and The Building (Scotland) Amendment Regulations 2011, SHTM 81 and SHTM 82;</p> <p>iv. How a Fire Engineering solution has been developed (if it has been proposed), to what extent it has been agreed with the regulatory authorities and how the Board will not be exposed to any additional risks (programme, quality or cost) should the solution need to be amended or abandoned during the course of the development and finalisation of proposals;</p> <p>v. Integration of their fire strategy with the fire strategy for the RIE Facilities to ensure they are compatible and operate in conjunction and how the fire strategy issues at the Link with the RIE Facilities are to be addressed;</p> <p>vi. Details of external and internal access and circulation routes, including a safety and security statement for each element of the scheme with particular reference to the different patient types using the Facilities; and</p> <p>vii. Details of how the particular issues in the surrounding areas of high fire risk such as the helicopter landing pad are to be addressed.</p>

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary			
Overall Comment	Score	Scoring Guidance	
		5	The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7	The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
		8-9	The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well against the Board's requirements.
		10	The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements
		NOT SCORED AT DRAFT FINAL TENDER	

Status		
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Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C17. Acceptable structural design proposals
Quality Evaluation Basis	Pass / Fail
Quality Evaluation Criteria Weighting	n/a
Submission Ref	Bidders must submit proposals setting out their approach to structural design. This must be provided as set out in C17.1 - C17.3 below.
Submission Requirement	C17.1 Bidders must submit proposals setting out a statement of the structural design philosophy which shall demonstrate how their design has been developed including a methodology for ensuring a safe, aesthetically pleasing and durable structure.
Submission Ref	C17.2 Bidders must submit proposals relating to the following elements:
Submission Requirement	i. Substructure; ii. Structural frame solution, including grid arrangements; iii. Ground, suspended floor slab and roof construction; iv. External wall and internal partition construction; v. Fire protection strategy and proposed methods to be adopted ; and vi. Methods for dealing with floor penetrations both during new build works and to accommodate future potential needs.
Submission Ref	C17.3 Bidders must submit the following:
Submission Requirement	i. A schedule and/or drawings demonstrating the dead and imposed loading design criteria (both uniformly distributed and concentrated loads) adopted for all areas of the Facilities; ii. Specification of construction and materials to be utilised in the hard external works e.g. roads, pavements etc.; iii. Details of their proposals for co-ordinating structure with space requirements and distribution of services taking into account maintenance and replacement during the operational life of the buildings; iv. Details of opportunities for the future expansion of Clinical Services and Non-Clinical Services. The Bidders shall ensure that the physical arrangement of the Facilities allows for growth and change of clinical services in the future, as far as is practical for example partition moves and additional service runs both vertically and horizontally. The cost implications of structural solutions to future proof the Facility by creating 'soft spots' (refer also to C5 above) shall also be included; and v. A detailed description of the design of the drainage system, taking into account matters such as the design itself, allowable discharge into the public sewers, the need or otherwise for surface water attenuation and the incorporation of drainage to existing buildings within the site drainage proposals.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary			
Overall Comment	Score	Scoring Guidance	
		5	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9	The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10	The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C18. Acceptable services, utilities and infrastructure proposals
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C18.1

Submission Requirement: Bidders must submit proposals setting out their mains service infrastructure strategy for the site, and defines principal service routes external to the buildings. This shall also demonstrate adequacies of capacities including details of these provided by Utility providers.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or + proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: + demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or + proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: + demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C19. Acceptable approach to achieving required BREEAM rating
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: Bidders must submit proposals setting out their approach to achieving the required BREEAM rating. This must be provided as set out in C19.1 and C19.2 below.
 Submission Requirement: Bidders must submit a draft BREEAM assessment of their proposals with supporting commentary. Bidders shall demonstrate how they will achieve, as a minimum, a "Very Good" rating in line with the requirements for healthcare facilities as set out in the BREEAM Scheme Document for New Construction (SD5073) 2011.
 Submission Ref: C19.2
 Submission Requirement: Where assumptions with respect to certain elements within these assessments have to be made (i.e. such details that would ordinarily be developed during the Preferred Bidder or post Financial Close period) the basis for these assumptions, including substantiation, must be set out in the Bidders proposals.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
				The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements. 5
			NOT SCORED AT DRAFT FINAL TENDER	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements 6-7
				The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements. 8-9
				The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements 10

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C20. Acceptable post Preferred Bidder stage design development proposals and design programme
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a

Bidders must submit proposals setting out their approach to design development and design programme. This must be provided as set out in C20.1 and C20.2 below.

Submission Ref: C20.1

Bidders must submit proposals setting out their approach to be adopted to manage the design process (taking account of the design review procedures to be implemented). For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:

Submission Requirement

- i. Further development of 1:500, 1:200 and 1:50 design drawings and other design details and how these will be developed in conjunction with the Board's project team, user groups, specialist advisers and other project stakeholders, to achieve sign off to the proposals;
- ii. Further development of the specifications and engineering related drawings and how these will be developed in conjunction with the Board's project team to achieve sign off of the proposals;
- iii. The anticipated level of involvement that the Board will have in the design development process, and the number of main design iterations anticipated;
- iv. Outline proposals for change control, confirmation of technical queries and other design related management tools; and
- v. Further development of interior design proposals to the satisfaction of the Board incorporating patient groups.

Submission Ref: C20.2

Bidders must submit a design programme to Financial Close and thereafter to design completion. This shall:

Submission Requirement

- i. Show the proposed programme for the development of the design drawings and specifications (supplemented by samples and models as appropriate) and other technical schedules to the NPD Project Agreement;
- ii. Clearly indicate the expected number of design drawings and specifications;
- iii. Clearly define periods allowed for the Board's consideration of proposals; and
- iv. Demonstrate how and when sign off of the Board's Construction Requirements will be achieved in this period by the Preferred Bidder, and how this sign off relates to development and sign off of Project Co Proposals.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate clear proposals setting out a robust process, supported with a logical and deliverable programme, for the development process both up to, and beyond, Financial Close.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C20. Acceptable post Preferred Bidder stage design development proposals and design programme

Additional Information List here any additional information/clarifications to be sought.	
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Summary	Overall Comment	Score	Scoring Guidance
		NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
			6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
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Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C21. Compliance with Board's Construction Requirements
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: Bidders must submit proposals setting out their approach to architecture and landscape design. This should be provided as set out in C3.1 – C3.3 below: C21.1
 Submission Requirement: Bidders must confirm their compliance with the Board's Construction Requirements. If as their design has been developed there are specific areas of the Board's Construction Requirements that Bidders would seek to change, these shall be scheduled and provided in support of the statement. The Board shall not be required to accept any proposed amendments.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
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Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
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Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C22. Acceptable design life proposals
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C22.1
 Submission Requirement: Bidders must submit a schedule of design life proposals against the elements listed in section 5.1 (Schedule of Life Expectancies) of the Board's Construction Requirements.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
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Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
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Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C23. Acceptable construction programme and approach to monitoring
Quality Evaluation Basis	Pass / Fail
Quality Evaluation Criteria Weighting	n/a
	Bidders must submit proposals setting out their construction programme and approach to monitoring. This must be provided as set out in C23.1 and C23.2 below.
Submission Ref	C23.1
	Bidders must submit a high level programme, for the Works, comprising a network and linked bar chart programme covering all of the main and key elements of design, construction, testing, commissioning and completion and covering the period from Financial Close to Post Completion Commissioning.
Submission Requirement	The programme must include as a minimum, the following information: i. Sequencing of activities showing logic links, restraints and constraints; ii. Key activity durations; iii. Critical paths, including the identification of critical dependencies of activities and float; iv. Key and other target milestones; v. Planning approval, and other statutory consents; and vi. Proposed Relevant Service Transfer Dates.
Submission Ref	C23.2
Submission Requirement	Bidders shall submit proposals setting out how they shall manage and monitor the programme, including their approach to minimising the effects of delays and unforeseen circumstances.
Pass / Fail Guidance	To Pass, Bidders will be required to demonstrate a logical and deliverable construction programme supported with a robust process for programme management.
Lead Reviewer(s):	
Support Reviewer(s):	

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
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Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
				The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
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Appendix D

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C24. Clarity, robustness and quality of construction methodology
Quality Evaluation Basis	Scored
Quality Evaluation Criteria Weighting	1.85
Pre-Score Pass/Fail Outcome	
Submission Ref	Bidders must submit their construction methodology proposals. This must be provided as set out in C24.1 - C24.10 below. C24.1
Submission Requirement	Bidders must submit proposals setting out in sufficient detail how they will deliver the development including their construction strategy, proposals and method statements. Bidders shall address in detail how the Works phase of the project will be managed including a methodology covering day to day management.
Submission Ref	C24.2
Submission Requirement	Bidders must submit proposals setting out in sufficient detail how they shall mitigate the egress of water, dust, debris or any microbiological contamination out of the Site and into adjacent buildings i.e. how they will ensure they are a considerate contractor.
Submission Ref	C24.3
Submission Requirement	Bidders must submit proposals setting out in sufficient detail how they will follow the provisions of Sections 60 and 61 of the Control of Pollution Act 1974, with reference to the control of noise due to any demolition or construction works in particular for works adjacent to an occupied property i.e. RIE and other occupiers of the wider estate.
Submission Ref	C24.4
Submission Requirement	Bidders must submit proposals setting out in sufficient detail how they will not only adhere to legal obligations but how they will ensure that "at all times the requirements and reasonable wishes and safety of the immediate neighbours to the Campus Site (including the Royal Infirmary of Edinburgh, Little France site) are respected" with particular consideration to key locations such as A&E and operating theatres.
Submission Ref	C24.5
Submission Requirement	Bidders must submit proposals to set out in sufficient detail how they will ensure that they will integrate with and not inhibit the RIE pedestrian, vehicular, cycle, service vehicular and emergency vehicular movements, access routes and parking during construction and during operation of the Facilities. The submission must set out how they will ensure site safety at all times.
Submission Ref	C24.6
Submission Requirement	Bidders must submit proposals, in sufficient detail, setting out how continuity of utility supplies and operational continuity of the immediate neighbours is to be maintained at all times. The Bidders submission shall also provide outage protocols in case these safeguards fail to protect the neighbours
Submission Ref	C24.7
Submission Requirement	Bidders must submit proposals, in sufficient detail, setting out a detailed methodology demonstrating their proposals for the safe and compliant disposal of surplus excavated material, all building spoil, demolition waste and rubbish.
Submission Ref	C24.8
Submission Requirement	Bidders must submit proposals of their site office set up. This shall describe in particular how they are to be serviced and how safe access and egress will be provided.
Submission Ref	C24.9
Submission Requirement	Bidders must submit proposals setting out in sufficient detail their approach to storage of materials. This shall describe in particular how materials will be delivered to, stored, and then transferred to the Site for incorporation in the Works.
Submission Ref	C24.10
Submission Requirement	Bidders must submit proposals setting out in sufficient detail their construction phasing and access methodology which shall demonstrate how the proposals have been developed to address the Site constraints and interfaces with the wider site. Bidders must include their proposals for creation of a temporary construction access over the Yellow Area (as shown on Plan 2). Bidders must submit details of location of access and methodology for its construction. This will form part of the management procedures for the Works as regards satisfying town planning matters as detailed in the ITPD. Further details are set out in paragraph 1 (Construction Access over Yellow Area) of Section 1 of Part 1 of Appendix A of the Board's Construction Requirements.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C24. Clarity, robustness and quality of construction methodology

<p>Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the</p>	
<p>Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.</p>	
<p>Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.</p>	
<p>Additional Information List here any additional information/clarifications to be sought.</p>	

Summary

Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status

Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C25. Acceptable approach to commissioning and handover
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C25.1

Bidders must submit proposals setting out a commissioning programme, supported by a methodology demonstrating how this will be developed and agreed in conjunction with the Board. For indicative purposes only it is anticipated that Bidders proposals may include (but shall not necessarily be limited to) how they will provide the following:

- i. Management of interfaces with the Board and the Board's contractors and other parties e.g. Consort for the Link Building and obtaining such other parties consents/approvals as required;
- ii. How they will carry out commissioning activities both before and after the Actual Completion Date;
- iii. Access for the Board during the Works including access for equipment installation (Groups 2A, 2B and 3) and the Board's Contractors;
- iv. A "zero defects" culture in order to deliver the scheme with few or no snagging items at the Actual Completion Date. Bidders shall outline a contingency plan for investigating and rectifying any defects which could still occur despite all best endeavours of the Project Co. In addition proposals should be submitted outlining how snagging items will be closed out after the Actual Completion Date;
- v. Facilities handover including how they shall interface and assist the Board with their decanting, familiarisation and training for the Facilities and proposals on how they shall work closely with the Board in developing an occupation plan;
- vi. Facilities which are "Clinically Clean" to the satisfaction of the Board's Head of Service Infection Control. Bidders shall demonstrate within their response:
 - How they propose to interface with the Board's Head of Service Infection Control to agree the process and standards required to achieve the appropriate level of clinical cleanliness for each location within the Facilities;
 - How this will be managed in terms of the sign-off of the Facility and handover process;
 - How this will conform with HAI Scribe; and
 - Details of any specialist contractors that may be used as part of this process.

Submission Requirement

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C25. Acceptable approach to commissioning and handover

Summary		
Overall Comment	Score	Scoring Guidance
<p style="font-size: 2em; opacity: 0.3; transform: rotate(-30deg);">Confidential</p>	<p>NOT SCORED AT DRAFT FINAL TENDER</p>	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C26. Acceptable approach to quality and environmental management systems
Quality Evaluation Basis	Pass / Fail
Quality Evaluation Criteria Weighting	n/a
Submission Ref	C26.1

Bidders must submit proposals setting out their approach to construction quality and environmental management systems. For indicative purposes only it is anticipated that Bidders proposals must include (but should not necessarily be limited to) the following:

- i. Confirmation that they will complete the Works in accordance with the requirements of BS EN ISO 9001 and 14001 or any equivalent standard;
- ii. Details of proposed quality assurance and environmental management systems (i.e. a system synopsis);
- iii. Details of their approach to developing the quality and environmental management systems, including key dates;
- iv. Where individual quality and environmental management systems of the designers, contractor, service provider and Project Co are to be used, a statement regarding how these separate systems will be integrated to form a coherent overall quality management system. For the avoidance of doubt, the Board requires Project Co (in addition to their sub-contractors) to adopt and implement a compliant system;
- v. Details of their approach for monitoring quality during construction (this may be by reference to a similar system implemented on a similar scheme); i.e. compliance with current revisions of BS 8000: Series "Workmanship on Building Sites, BS 5606:1990 "Guide to Accuracy in Building". and other activities based on Good Industry Practice current at the time, as a minimum;
- vi. Details of their approach for auditing the quality and environmental management systems. This shall include details of the independent, internal and external audits of Project Co and its sub-contractors; and
- vii. A description of how the proposed systems will integrate with their strategies for risk mitigation.

Lead Reviewer(s):
Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C26. Acceptable approach to quality and environmental management systems

Overall Comment	Score	Scoring Guidance
<p style="text-align: center; opacity: 0.5; font-size: 48px;">Confidential</p>	<p>NOT SCORED AT DRAFT FINAL TENDER</p>	<p>5</p> <p>The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.</p>
		<p>6-7</p> <p>The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements</p>
		<p>8-9</p> <p>The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.</p>
		<p>10</p> <p>The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements</p>

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C27. Acceptable approach to health and safety management
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C27.1

Bidders must submit proposals setting out their health and safety management system. For indicative purposes only it is anticipated that Bidders proposals must include (but should not necessarily be limited to) the following:

- i. Confirmation that they will adopt and implement an accredited health and safety management system complying with the requirements of OHAS ISO 18001. For the avoidance of doubt the Board requires that Project-Co adopt and implement a compliant system;
- ii. Details of all proposed designers, sub-contractors, and suppliers confirming that they operate and accredited health and safety management system complying with OHAS 18001 standards covering all aspects of the project as applicable. Copies of current certificates from an accredited third-party assessment body showing that systems are compliant should be provided;
- iii. Details of the approach for auditing designers, contractors, sub-contractors and suppliers of their health and safety management systems. This should include details of internal, external and independent audits of Project-Co;
- iv. Proposals for managing occupational health that will be implemented;
- v. Key dates for development of the system;
- vi. Safety in design and how Bidders have removed risks through design innovations;
- vii. Potential constraints on their Works activities when considering the health and safety of their immediate neighbours and other members of the public that may be affected by the Works. This shall include construction traffic management plan within the Campus at Little France and restrictions on the movement of water, dust, vibration, noise and micro-organisms;
- viii. How any risks to health and safety will be managed and mitigated throughout the Works;
- ix. How they plan to deal with the potential occurrence of below ground services crossing the Site, in addition to the removal of other below ground obstructions that may still be present from previous demolition works;
- x. Methodology for the use of overhead cranes;
- xi. The removal of waste material;
- xii. Compliance with HAI Scribe;
- xiii. Storage, transportation and handling of gas cylinders (for construction use); and
- xiv. How their proposals facilitate the control and management of an outbreak and spread of infectious diseases in accordance with HTM 2025 and SHFN 30.

Submission Requirement

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C27. Acceptable approach to health and safety management

Additional Information List here any additional information/clarifications to be sought.	
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Summary	Overall Comment	Score	Scoring Guidance
		NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
			6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
			8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
			10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C28. Acceptable approach to compliance with CDM regulations
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a

Bidders must submit proposals setting out their approach to achieving compliance with the CDM regulations. This must be provided as set out in C28.1 and C28.2 below.

Submission Ref: C28.1

Bidders must submit proposals setting out how they will comply with the requirements of the Construction (Design and Management) Regulations 2007. Particular reference shall be made to Project Co's role as Client, in addition to proposals to cover discharging the duties of CDM Coordinator, Designer and Principal Contractor under the Regulations. Bidders shall also include the methodology to demonstrate how they will deal with potential commercial and other conflicts between their constituent parts with respect to compliance with the Regulations and shall provide the following:

- i. A competency submission for the individual who will be leading the role of CDM co-ordinator, in accordance with CDM ACOP L144 "Managing Health and Safety in Construction";
- ii. A Health and Safety document to identify how the requirements of Appendix 4 of the ACOP L144 "Managing Health and Safety in Construction" will be applied on the project;
- iii. The format of the Pre- Construction Information relating to the project to address the requirements of Appendix 2 of the CDM ACOP L144 "Managing Health and Safety in Construction";
- iv. The contents and structure of the Construction Phase Plan relating to the project to address the requirements of Appendix 3 of the CDM ACOP L144 "Managing Health and Safety in Construction";
- v. Details of the induction process to address the requirements of section 184 and 185 of the CDM ACOP L144 "Managing Health and Safety in Construction";
- vi. The format to be used for the Health and Safety File to address the requirements of section 263 of the CDM ACOP L144 "Managing Health and Safety in Construction";
- vii. Details of the process for managing health and safety in Design including hazard elimination and risk reduction, principles of prevention, provision of information and management of the Design process as required by the CDM ACOP L144 "Managing Health and Safety in Construction".

Submission Requirement

Submission Ref: C28.2

Bidders must submit proposals setting out how they have complied with the CDM duties during the Dialogue Period and provide a design risk assessment which is to be updated as the design is progressed.

Submission Requirement

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C28. Acceptable approach to compliance with CDM regulations

Additional Information List here any additional information/clarifications to be sought.	
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Summary	Overall Comment	Score	Scoring Guidance
		NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
			6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
			8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
			10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C29. Robustness of technical costs
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C29.1

Submission Requirement: Bidders must submit fully completed technical cost proformas contained in the ITPD. All information requested must be provided. Bidders' completed proformas shall be provided in the same MS Excel format to allow direct comparison between bids.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that their technical costs are robust for the scope of works to be delivered.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C30. Acceptable list of summary assumptions, clarifications and derogations
 Quality Evaluation Basis: Not Scored
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C30.1
 Bidders must submit a consolidated schedule of all assumptions, clarifications and qualifications made in respect of their ITPD Bids. Whilst it is encouraged that such references are also made in the appropriate locations throughout Bidders' submissions, it is a mandatory requirement of the ITPD Submission that all such matters are also summarised in a single location.
 Submission Requirement
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C31. Acceptable Interface Proposals
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C31.1
 Submission Requirement: Bidders must submit proposals setting out their approach to meeting the interface issues as described in Appendix A of the Board's Construction Requirements (subject to the conditions set out in Clause 9 (Nature of Land Interests) including without limitation Schedule Part 5 (Land Matters) of the NPD Project Agreement).
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
				5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
			NOT SCORED AT DRAFT FINAL TENDER	6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D1. Clarity, robustness and quality of approach to management and administration of the Services and Contract
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.5
 Pre-Score Pass/Fail Outcome:
 Submission Ref: D1.1

Bidders must submit proposals setting out their proposed approach to managing and administering both the Services and the NPD Project Agreement itself. The Bidder is also required to provide a detailed proposal for the management, liaison and interfacing with the Board and the other Board service providers, these being Authority Parties. The importance to the Board of a holistic approach to the delivery of Services under the NPD Project Agreement cannot be overstated. The success of this will be dependent upon the quality of the general management of the Project.

Bidders must submit the following:

- i. Full Method Statements for the management and administration of the Project Agreement and Services contained therein;
- ii. Location of the members of Project Co's administration team (i.e. on or off site);
- iii. Details of Bidder's proposed managerial structure, indicating the roles and responsibilities of each manager, supervisor and team member;
- iv. Details of how material changes to the management structure of Project Co will be communicated to the Board;
- v. Details of how changes to working practices and / or Service delivery timings will be communicated to the Board; and
- vi. Details of how it is proposed to electronically manage Services management and administration to improve delivery.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary			
Overall Comment	Score	Scoring Guidance	
	NOT SCORED AT DRAFT FINAL TENDER	5	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9	The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10	The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D2. Acceptable approach to integration with Board policies and operation
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D2.1

Submission Requirement: Bidders must submit proposals setting out how they will comply, integrate and align their methodologies with the Board's policies, operation and procedures for the delivery of Services to the Facilities. This must include the following:
 i. Details of how it will ensure that the Services are delivered in accordance with the requirements of the Health planning Standards/NHS Requirements as detailed within paragraph 2.3 of Volume 3 of the ITPD.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D3. Acceptable approach to ensuring quality management
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D3.1

Bidders must submit proposals setting out their Method Statements for quality management. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:
 i. Description of any quality management systems or policies the Bidder has for the Services or would put in place for the Services;
 ii. Interface with the Board's Quality Assurance representatives
 iii. Process to ensure that Project Co's advisers are continually aware of any relevant legislative changes and procedures for communicating these changes to the Board as appropriate;
 iv. Proposals for carrying out audits, including the provision of their proposed audit programme for the Services; and
 v. Details of the Bidder's proposals for the escalation of activities following a major incident including interface with the Board.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
		5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements
	NOT SCORED AT DRAFT FINAL TENDER	

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D4. Acceptable approach to ensuring environmental management
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D4.1

Bidders must submit proposals setting out their Method Statements for environmental management. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:

- i. Interface with the client's environment representatives;
- ii. Process to ensure that Project Co's advisers are continually aware of any relevant legislative changes and procedures for communicating these changes to the Board as appropriate;
- iii. Details of their approach to ISO 14001 and shall describe any relevant experience of implementing such systems for other local authority or NHS clients of the Bidder;
- iv. Bidder's environmental policy statement, and shall state explicitly whether they have, or are working towards developing an environmental strategy;
- v. Bidder's environmental management system, for their own organisation and/or for this project;
- vi. Structure of the environmental management system;
- vii. Details of the Bidder's approach and commitment to use of ethical and sustainable materials;
- viii. Proposals for carrying out audits, including the provision of an indicative audit programme for the Services; and
- ix. Details of the Bidder's proposals for the escalation of activities following a major incident, including interface with the Board.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D5. Acceptable approach to ensuring health and safety management
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D5.1

Bidders must submit proposals setting out their Method Statements for health and safety management. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:
 i. Procedure for disseminating hazard and safety warnings;
 ii. Methodology for the development and maintenance of the health and safety system relevant to the Services;
 iii. Interface with the Board's health and safety representatives;
 iv. Process for maintaining effective overall control of all site activities and the coordination of and liaison with all staff such that there are suitable integrated arrangements to allow compliance with the Health and Safety at Work Act 1974;
 v. Process to ensure that Project Co's advisers are continually aware of any relevant legislative changes and procedures for communicating these changes to the Board as appropriate;
 vi. Process to ensure constant access to health and safety professionals for both its own staff and the Board's nominated representatives;
 vii. Develop bespoke risk assessments recognising the services being delivered at the RIE and University on the wider Campus.
 viii. A copy of the Bidder's Health and Safety policy and a description of their approach to ISO 9001 and ISO 18001 or similar systems;
 ix. Proposals for carrying out audits, including the provision of an indicative audit programme for the Services; and
 x. Details of their proposals for the escalation of activities following a major incident including interface with the Board.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
				5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
			NOT SCORED AT DRAFT FINAL TENDER	6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D6. Acceptable approach to interfacing with the Board for undertaking works outside of access times
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D6.1

Submission Requirement: Bidders must submit proposals setting out their approach to interfacing with the Board for undertaking works outside of access times. This must include the following:
 i. How they will ensure that any Works and Services proposed to be undertaken outside agreed Access Times are agreed with the Board's Representative prior to commencement; and
 ii. How Works and Services will be managed and carried out in accordance with Permit to Work System.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D7. Clarity, robustness and quality of approach to partnership and resources including liaison, resources and supply chain management
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.5
 Pre-Score Pass/Fail Outcome:

Bidders must submit proposals setting out their approach to partnership and resources including liaison, resources and supply chain management. This must be provided as set out in D7.1 – D7.3 below.

Submission Ref: D7.1
 Submission Requirement: Bidders must submit proposals setting out their approach to communications with the Board or its representatives. This shall include their proposed appropriate interfaces, frequency, nature and structure of meetings and reporting.

Submission Ref: D7.2
 Submission Requirement: Bidders must submit proposals setting out:
 i. Details of storage, maintenance and disposal of plant, equipment, materials, consumables, packaging and chemicals used in the delivery of the Services;
 ii. Details of suitably qualified staff and availability to meet the requirements of this NPD Project Agreement.

Submission Ref: D7.3
 Submission Requirement: Bidders must submit proposals setting out:
 i. Details of how the supply chain will be managed;
 ii. Proposed approach to delivery of Services through the supply chain;
 iii. Method of creating a successful integrated Services team.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D8. Acceptable approach to business continuity planning
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D8.1

Bidders must submit proposals setting out their approach to business continuity planning. This must include the following:
 i. Details of its approach to business continuity planning including:
 a. Its approach to the creation and maintenance of its own business continuity plan and disaster recovery plans for the required Services;
 b. The proposed approach to supporting the Board's "Business Continuity; and
 c. Details of who within the management team will have overall responsibility for business continuity.
 ii. Details of its proposed training procedures for staff who will participate in emergency procedures;
 iii. Details of its proposals for testing Business Continuity Plans at the property;
 iv. Details of its proposals for the escalation of activities following a major incident (and/or at the request of the Board);
 v. Details of its own, internal Business Continuity (e.g. those plans related to its own survival as a business following a major incident); and
 vi. Details of the existing arrangements for testing its own, internal Business Continuity Plans.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

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Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D9. Acceptable fire safety policies and procedures
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D9.1
 Bidders must submit proposals setting out their approach to fire safety policies and procedure. This must include the following:
 i. Details of its fire safety policy
 ii. Details of fire safety and security systems and procedures to be implemented on site including their approach to the Helipad.
 iii. Approach to ensuring an integrated fire safety strategy for the overall site, including appropriate interfaces with the Board and other Third Party organisations i.e. Authority Parties.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or + proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: + demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or + proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: + demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	D: Approach to Facilities Management
Submission Requirement Reference	D10. Clarity, robustness and quality of approach to performance and information management including; helpdesk, programme maintenance lifecycle, performance monitoring, monitoring and records, regular reports and information requests, building services and statutory testing
Quality Evaluation Basis	Scored
Quality Evaluation Criteria Weighting	4.5
Pre-Score Pass/Fail Outcome	
Submission Ref	D10.1
Submission Requirement	<p>Bidders must submit proposals setting out details of their proposed computer-aided facilities management (CAFM) system and how they will provide an asset management and reporting capability. For indicative purposes only it is anticipated that Bidders proposals must include (but should not necessarily be limited to) the following:</p> <ol style="list-style-type: none"> i. Call receipt and management and escalation; ii. Management information; iii. Reporting; iv. Incident management; v. Alarm management; vi. Maintenance scheduling; vii. Asset data maintenance; viii. Helpdesk interface protocol with the Board and/or third party's; ix. Proposed staffing and location of the helpdesk; x. Interface between the helpdesk and other aspects of the CAFM system; xi. Reporting procedures and frequency of reporting; and xii. Enabling the Board to gain access to the data held within the BMS in a format/method agreeable to the Board.
Submission Ref	D10.2
Submission Requirement	<p>Bidders must submit proposals setting out their approach to programme maintenance lifecycle. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:</p> <ol style="list-style-type: none"> i. The information and delivery strategy which will be utilised in establishing a Programmed Maintenance planner; ii. Confirmation that the Bidder recognises that certain works will need to be undertaken out of normal working hours/ during the weekends to minimise the impact on the Board's operations, and without additional cost to the Board; iii. Method of establishing and updating their 5-year Maintenance Lifecycle plan; iv. Details on the provision of all specialist sub-contractors for programmed maintenance and lifecycle; v. Details of how it will ensure that the delivery of all Services will underpin the required hygienic/infection control standards for the facility, specifically compliance with HAI Scribe standards; vi. Details on staffing and management of the Service; vii. Details on how planned, reactive and statutory works are to be monitored for both quality and safe methods of work. This should include works that are undertaken by directly employed staff and any sub-contractors; viii. Details of proposals to assess staff roles and responsibilities, skill requirements, competency, training arrangements and review procedures; ix. Details on its approach to planned, reactive and statutory maintenance including prioritising business critical equipment and systems at all premises together with details on how any planned maintenance that is not achieved by the planned date is addressed; x. Sample of proposed Service Report to be used for this Contract; xi. Details on interface with Board's cleaning service when carrying out Programmed Maintenance; xii. Schedule for cleaning of all internal and external panes of glazed areas of the Facilities envelope; and Schedule of planned external façade cleaning service.
Submission Ref	D10.3
Submission Requirement	<p>Bidders must submit proposals setting out details of their proposed delivery strategy and key activities. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following service areas:</p> <ol style="list-style-type: none"> i. Mechanical maintenance ii. Electrical maintenance iii. Plumbing iv. Lift maintenance v. Fire safety system/ equipment vi. Internal / external fabric of the Facilities vii. Periodic electrical testing and inspections viii. Lift inspections ix. Pressure vessel x. Pressure systems (written schemes) xi. Water systems risk assessments xii. Fire risk assessments xiii. Water sampling / testing

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Appendix D

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	D: Approach to Facilities Management
Submission Requirement Reference	D10. Clarity, robustness and quality of approach to performance and information management including; helpdesk, programme maintenance lifecycle, performance monitoring, monitoring and records, regular reports and information requests, building services and statutory testing
Submission Ref	D10.4 Bidders must submit proposals setting out their approach to performance monitoring. This must include the following:
Submission Requirement	i. Description of how the performance of the Service will be self-monitored; ii. Approach to customer feedback and complaints handling; iii. Sample customer feedback form.
Submission Ref	D10.5 Bidders must submit proposals setting out their approach to monitoring and records. This must include the following:
Submission Requirement	i. Details on how the Bidder will ensure all certificates, appropriate documentation and records in relation to the Project are stored in accordance with appropriate legislation and the Board's policies; and ii. Details on how the Bidder will ensure all records in relation to the Project are maintained accurately and kept up-to-date.
Submission Ref	D10.6 Bidders must submit proposals setting out their approach to regular reporting and information request. This must include the following:
Submission Requirement	i. Procedures for ensuring that the reports are appropriately tailored to the Boards requirements, including the completion period for such reports; ii. Details on how it will ensure that reports are accurate and produced in line with agreed timescales; iii. Details of the types of reports that they are currently producing for other clients.
Submission Ref	D10.7 Bidders must submit proposals setting out their approach to building services. This must include the following:
Submission Requirement	i. Approach to commissioning new Plant and Equipment; ii. Details on how hardware and software licenses will be kept up to date; iii. Details on how to ensure all Equipment/ Assets used in the delivery of the Services are maintained properly and safe to use.
Submission Ref	D10.8
Submission Requirement	Bidders must submit proposals setting out their approach to statutory testing.
Lead Reviewer(s):	
Support Reviewer(s):	

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D10. Clarity, robustness and quality of approach to performance and information management including; helpdesk, programme maintenance lifecycle, performance monitoring, monitoring and records, regular reports and information requests, building services and statutory testing

Additional Information List here any additional information/clarifications to be sought.	
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Summary	Overall Comment	Score	Scoring Guidance	
		NOT SCORED AT DRAFT FINAL TENDER	5	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
			6-7	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
			8-9	The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
			10	The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D11. Acceptable approach to un-programmed maintenance
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D11.1
 Submission Requirement: Bidders must submit proposals setting out their approach to Un-programmed Maintenance Works. This must include the following:
 i. Meeting the relevant Rectification Period; and
 ii. Meeting the standards required.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D12. Clarity, robustness and quality of approach to service elements including; utilities management and grounds maintenance services
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.5

Pre-Score Pass/Fail Outcome

Submission Ref: Bidders must submit proposals setting out their approach to service elements including utilities management and grounds maintenance. This must be provided as set out in D12.1 and D12.2 below.
 D12.1

Submission Requirement: Bidders must submit a detailed methodology describing their approach to utilities management. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:
 i. Proposals to ensure an adequate continuous supply of energy is available;
 ii. Proposals for interface with the Board to ensure no interruptions in the supply of Utilities to the Facilities;
 iii. Proposals for procurement of Utilities for the Board which demonstrate value for money;
 iv. Maintenance approach to ensure all external Utility infrastructures within the Site is fully functional;
 v. Method of monitoring Utilities/carbon consumption and how usage will be analysed and used;
 vi. Sample Utility consumption report;
 vii. Proposals for improving energy/ carbon efficiency; and
 viii. Details on Utility energy profile audit.

Submission Ref: D12.2
 Submission Requirement: Bidder must submit proposals setting out their approach to grounds maintenance. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:
 i. Methodology for Grounds Maintenance Service and indicative programme for Planned Maintenance; and
 ii. Interface with third parties in ensuring a holistic approach to the safe use of the Campus access and egress routes

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D12. Clarity, robustness and quality of approach to service elements including; utilities management and grounds maintenance services

Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary	Overall Comment	Score	Scoring Guidance
		NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
			6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
			8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
			10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D13. Robustness of technical costs
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D13.1

Submission Requirement: Bidders must submit fully completed technical cost proformas for the Services contained in the ITPD. All information requested must be provided. Bidders' completed proformas shall be provided in the same MS Excel format to allow direct comparison between bids.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that their technical costs are robust for the scope of works to be delivered.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D14. Acceptable list of summary assumptions, clarifications and derogations
 Quality Evaluation Basis: Not Scored
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D14.1
 Submission Requirement: Bidders must submit a consolidated schedule of all assumptions, clarifications and qualifications made in respect of their ITPD Bids. Whilst it is encouraged that such references are also made in the appropriate locations throughout Bidders' submissions, it is a mandatory requirement of the ITPD Submission that all such matters are also summarised in a single location.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D15. Acceptable approach to mobilisation of Facilities Management services
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D15.1

Bidders must submit proposals setting out their approach to mobilisation of facilities management services. For indicative purposes only it is anticipated that Bidders proposals must include (but should not necessarily be limited to) the following:

- Submission Requirement
- i. A draft mobilisation plan using MS Project showing the activities to be performed, interdependencies between activities, the allocation of resources and where Board input is required;
 - ii. Details of their proposed structuring and resourcing for mobilisation. This should include the names and CVs of the proposed mobilisation management team, indicating relevant experience;
 - iii. Details of proposed communications with the Board during mobilisation. This shall propose appropriate interfaces and the frequency, nature and structure of meetings and reporting;
 - iv. Approach to recruitment of staff, including as appropriate relevant security clearances;
 - v. Detailed proposals for the establishment of the Helpdesk service that clearly demonstrates an understanding of the operational and technical interfaces with Board Services;
 - vi. Proposals for installation and population of the CAFM system describing (as applicable) how installation shall be effected and how data will be migrated and tested; and
 - vii. Method of vetting staff and acquiring the necessary and appropriate security clearances.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or + proposes a solution which performs well against the Board's requirements.
		8-9 The Bidder's approach: + demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or + proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: + demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B1. Clarity, robustness and quality of understanding of policy framework and approach to addressing these.
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.16
 Pre-Score Pass/Fail Outcome
 Submission Ref: B1.1

Submission Requirement: Bidders must submit proposals setting out their understanding of the relevant local and national health policies and describe how these strategic issues have been included within the Bidders' Final Tender submission, in particular with respect to the delivery of solutions specific to this Project.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate a clear understanding of national health policies specific to the Project.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the output specification?	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements		
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.		
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.		

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B2. Clarity, robustness and quality of approach to contribution to delivering the Board's 'vision' and associated performance management regime
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.32
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B2.1
 Submission Requirement: Bidders must submit proposals setting out how their proposals will enhance and contribute to the Board's vision. Bidders should explain their role in delivering the Board's vision, and include proposed performance management mechanisms for demonstrating Project Co's contribution to the achievement of this vision.
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will contribute to the Board's vision.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
				5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements NOT SCORED AT DRAFT FINAL TENDER
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.

		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.
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Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B3. Clarity, robustness and quality of understanding of Project outcomes and approach to contribution of delivering these
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.57
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B3.1

Submission Requirement: Bidders must submit proposal setting out their understanding of the Project outcomes (as outlined in the Boards benefits realisation plan) and how their proposals will contribute to the delivery of outcomes/benefits with specific details of how the Bidder has already addressed these in their Final Tender submission, or how they will be addressed after Final Tender submission. Bidders must also outline what they offer by way of skills and/or innovative solutions to deliver these outcomes/benefits.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they understand the Project outcomes and will contribute to these.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary	Overall Comment	Score	Scoring Guidance
			5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		NOT SCORED AT DRAFT FINAL TENDER	6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
			8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.

10

The Bidder's approach:
• demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or
• proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B4. Clarity, robustness and quality, of approach to partnership and collaborative working with the Board and its partners
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.81
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B4.1

Bidders must submit a method statement outlining their approach to collaborative working and developing and maintaining a successful long term partnership with the Board and its partners, (i) in the period from Preferred Bidder appointment to Financial Close; (ii) throughout the construction period; and (iii) operational period of the contract confirming in their proposals:

- Submission Requirement
- What they believe to be the factors critical to achieving a successful relationship (both short term and long term);
 - Their understanding of the key interface issues and how they intend to manage these and integrate with the existing relationships;
 - How they will develop and maintain a full understanding of the Boards' objectives including matters identified during Dialogue;
 - How their objectives can reflect and adapt to the Board's goals as they evolve over time; and
 - The manner in which they will conduct themselves that accords with the culture of the Board, local communities and other key stakeholders to the Project.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to collaborative working.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Score	Scoring Guidance
Overall Comment			5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.

Final

	NOT SCORED AT DRAFT FINAL TENDER	6-7	The Bidder's approach: <ul style="list-style-type: none"> demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or proposes a solution which performs well against the Board's requirements
		8-9	The Bidder's approach: <ul style="list-style-type: none"> demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or proposes a solution which, performs very well against the Board's requirements.
		10	The Bidder's approach: <ul style="list-style-type: none"> demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B5. Clarity, robustness and quality of approach to staff development including recruitment, training, induction and HR issues
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.32
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B5.1

The Bidders must submit proposals setting out details of the following:
 • Approach to recruitment and vetting of staff, including as appropriate relevant security clearances (e.g. Disclosure Scotland, Protection of Vulnerable Groups Scheme etc);
 • Procedures for working in areas with children or vulnerable persons; and
 • Details of its employment policy and evidence that employees and prospective employees are treated fairly irrespective of race, gender, religion, disability or background.

Submission Ref: B5.2
 B5.2 Human Resources Issues
 The Bidders must submit proposals setting out:
 • Details of their Occupational Health approach for staff having come into contact with high risk person or areas.

Submission Ref: B5.3
 B5.3 Training and Induction
 The Bidders must submit proposals setting out:
 • Details of any achievement in relation to the Investors In People initiative (or equivalent);
 • Details of the Bidder's employee development and appraisal system;
 • Details of its own and its supply chain's training policy and procedures, including an indication of the training to be offered to the on-site staff specific to this Contract and a statement of the percentage of their annual turnover which is spent on staff training;
 • Details of induction programme and ongoing training for staff, specifically working with HV systems and Legionella control; and
 • Details of induction programme for sub-contractors.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to staff development.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria

Sub Category: B: Strategic and Management Approach (5%)

Submission Requirement Reference: B6. Clarity, robustness and quality of approach to delivering community benefits

Quality Evaluation Basis: Scored

Quality Evaluation Criteria Weighting: 0.32

Pre-Score Pass/Fail Outcome:

Submission Ref: B6.1

Submission Requirement: Bidders must submit their proposals to deliver community benefits as part of the Project in accordance with Clause 73 (Community Benefits) of the NPD Project Agreement and Appendix I of Volume 1 of the ITPD. These should include specific proposals covering economic, environmental and social benefits related to the Project during both the construction and operational stages of the Project.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to community benefits (including complying with the minimum targeted recruitment numbers set out in Appendix I Section 2.1).

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B7. Clarity, robustness and quality of approach to integration of design with facilities management considerations
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.32
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B7.1

Bidders must submit proposals demonstrating how a consistent and a coordinated approach will be developed and assured between the building design and FM solutions. Bidders shall take account of the hard FM site interface issues and integration with the soft FM which will be provided by the Board. Bidders responses shall include specific proposals on:

- Submission Requirement
- How their design development process will consider and incorporate the FM aspects at each stage of the process from pre financial close through to construction; and
 - The method by which design coordination issues will be managed and FM interface issues raised with the Board and its partners.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to integration of design with facilities management.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B8. Clarity, robustness and quality of approach to consortia management arrangements including approach to sub contractors
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.57
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B8.1

Bidders must submit proposals setting out details of how its consortium will be managed, setting out the key roles and their responsibilities including technical roles within their consortium they have identified as key to the Project during contract finalisation, construction and operational stages and Project Co's role in leading the project management. This shall include team leaders for all principal disciplines, both before and after financial close, and may include but not be limited to the following:

- Submission Requirement
- Project and programme management;
 - Risk management;
 - Design;
 - Works;
 - Services; and
 - Quality, safety and environmental management including HAISCRIBE and BREEAM.

Submission Ref: B8.2

Where any element of the Works and/or Services are to be provided by subcontractors other than the Contractor or Service Provider(s) Bidders must submit details of:

- Submission Requirement
- The selection process undertaken for such sub contractors that are confirmed at the time of submitting Final Tender, and/or the selection process (including timescales) that will be undertaken for those subcontractors yet to be confirmed; and
 - The manner in which performance of the sub contractors will be secured and integrated within the overall performance requirements of the Board's output specifications.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to consortia management proposals.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary

Overall Comment	Score	Scoring Guidance
	5	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
	6-7	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
	8-9	The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
	10	The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.
	NOT SCORED AT DRAFT FINAL TENDER	

Status

Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B9. Quality of proposed personnel
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.32
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B9.1
 Submission Requirement: Bidders must submit a summary curriculum vitae (maximum of two pages per person) of the personnel proposed for the roles identified in B8 above which shall include (as a minimum) details of key experience, education and professional status.
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that their key personnel have satisfactory levels of experience.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B10. Clarity, robustness and quality of approach to continuity throughout the Project
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.32
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B10.1
 Bidders must submit proposals setting out their continuity plan for all stages of the project. The key matters to be addressed will include:
 • how any changes in personnel between their pre and post financial close teams will be managed and communicated;
 • describe how as part of the design development process they view Project Co's role in ensuring design continuity and knowledge transfer. This will include how they will achieve design team continuity throughout the whole design development, construction and operational phases considering the consortium team and design organisations, and the key personnel working within each of those organisations. The continuity plan shall address proposals for the role of design staff on-site during the development and the Works phase; and
 • the submission should particularly address the issue of consistency of personnel throughout the project and the need for procedures to deal with knowledge transfer to ensure smooth transition when required.
 Submission Requirement
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that there will be continuity throughout the Project.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B11. Acceptable organisational diagrams for each stage of Project
 Quality Evaluation Basis: Pass/Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: B11.1
 Bidders must submit organisation diagrams for the consortium including the lines of communication with the Board and other key stakeholders for each of the phases of the project including:
 Submission Requirement:
 • contract finalisation (appointment of Preferred Bidder to Financial Close);
 • construction and commissioning period; and
 • operational term.
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate a clear organisational structure for each stage of the Project.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B12. Clarity, robustness and quality of approach to health and safety
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.81
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B12.1

Bidders must submit a detailed health and safety strategy which the Bidder proposes to adopt to comply with in fulfilling their health and safety obligations throughout the project, covering the following phases:
 • contract finalisation (appointment of Preferred Bidder to Financial Close);
 • construction and commissioning period; and
 • operational term.

In particular, the proposals should address Project Co's leadership role and key project roles throughout and particularly in the delivery and management of the Project on a 24/7 operational site, addressing key issues such as:

- The Boards requirements;
- Operational continuity requirements of the RIE Facilities;
- Obligations to connect to and maintain critical service connections;
- Traffic management – construction and operational access/ egress;
- Compliance with HaiScribe requirements;
- Construction activity;
- Linking to a live operational major health facility;
- Proximity to live operational general hospital facility (24/7) and medical school;
- Security issues;
- Access and maintenance requirements of the project;
- Pollution control;
- Noise, dust, water egress, and vibration issues and the like; and
- Details of business continuity plans.

Submission Requirement

Pass / Fail Guidance

To Pass, Bidders will be required to demonstrate they will adopt a robust approach to health and safety.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
		The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements. 5
		The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements 6-7
	NOT SCORED AT DRAFT FINAL TENDER	The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements. 8-9
		The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements. 10

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B13. Acceptable approach to environmental, quality and health and safety management systems
 Quality Evaluation Basis: Pass/Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: B13.1

Submission Requirement: Bidders must submit proposals setting out how Project Co intends to set up, manage, maintain, work towards and gain accreditation of its environmental, health and safety and quality management systems including specific proposals on:
 • The systems to be developed and implemented;
 • How these systems will be put in place;
 • The process for the development of the systems;
 • Interim measures while the systems are being developed; and
 • Timescales for accreditation.

Submission Ref: B13.2

Submission Requirement: As a minimum Bidders must submit proposals setting out the following aspects of their environmental, health and safety and quality management systems:
 • Proposed document management systems;
 • Verification procedures for design work;
 • Detailed change control procedures for each stage of the Project;
 • Procedures and a programme for carrying out Project reviews; and
 • Description of the procedures to co-ordinate and manage the design process including the interface between design teams and continuity of design team members (as set out in B10). In addition, a statement of how and when design changes will be reviewed and commented on by Project Co/ Service Provider.

Submission Ref: B13.3

Submission Requirement: Bidders must submit proposals demonstrating that they operate an accredited Health and Safety management system complying with the OHAS 18001 standard.
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt an acceptable approach to management systems.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

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Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B14. Clarity, robustness and quality of approach to management of design development including integration with the Board and its partners
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.16
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B14.1

Submission Requirement: Bidders must submit proposals setting out :
 • Their approach to managing the Project's design development, with particular emphasis on development post Final Tender, including proposals for interface with specific sub-groups harmonising with the current Board Project structure. The submission should include a description of the procedures to co-ordinate and manage the design process and to interface with key stakeholders, including document management, verification of design, change control during design development and design reviews; and
 • The management and review structures and procedures that will be put in place by the Bidder to manage potential conflicts, delays, changes in the Board's goals and other issues at each key design stage of the Project.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to management of design development including a commitment to working with the Board.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix D

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B15. Acceptable programme from appointment as Preferred Bidder to Financial Close
 Quality Evaluation Basis: Pass/Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: B15.1
 Bidders must submit a week by week programme covering the contract finalisation period from appointment of Preferred Bidder until Financial Close with a detailed breakdown of the key tasks to be completed by the end of each week with the critical path and key milestones shown. Bidders shall supplement the programme with commentary on, as a minimum, the following matters:
 • Mechanisms that will be adopted to ensure that the critical path for the technical, legal and commercial activities will remain on programme, and therefore that the overall Project programme is maintained;
 • Confirmation of key inputs, timescales and required by dates for the Board to review/approve Bidder submissions during contract finalisation;
 • Confirmation that their overall programme to Financial Close, is achievable; and
 • Key risks to the Project proceeding on programme shall also be identified, with a brief commentary on how the Bidder proposes to mitigate each risk.
 Submission Requirement
 Pass / Fail Guidance: To Pass, Bidders will be required to submit a logical and deliverable programme.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C1. Clarity, robustness and quality of approach to meeting the stakeholders requirements in their design
Quality Evaluation Basis	Scored
Quality Evaluation Criteria Weighting	2.64
Pre-Score Pass/Fail Outcome	
Submission Ref	C1.1

The Bidders must submit proposals setting out their approach to meeting the stakeholders requirements in their design.

For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:

- i. Evidence that they are sensitive to the co-location of the RHSC and DCN and that they will take advantage of this arrangement to maximise their design;
 - ii. Evidence that they are aware of the wide range of stakeholders associated with these departments and that they understand and will cater for all their requirements in their design;
 - iii. Evidence that their bid will deliver a nurturing, engaged and safe community that supports the well being of all patients, carers, families, visitors and staff;
 - iv. Evidence that their design will provide a healing environment that will assist the Board in its core obligation to deliver clinical care to users of both the RHSC and DCN;
 - v. Evidence that their design will include particular consideration of the proposed external spaces, therapy gardens and landscaping, communal patient areas for example quiet and television rooms, public areas;
 - vi. Evidence that their design will adequately address security requirements;
 - vii. Evidence that their design will fully incorporate infection control requirements and HAI Scribe; and
 - viii. In particular for the RHSC and CAMHS, we would expect the Bidders to demonstrate how the design will be developed to achieve:
 - i. Facilities that are a beautiful place with children and young people at the centre of a nurturing, engaged and safe community;
 - ii. Facilities that are reassuring, relaxing, convenient and safe with the needs of children and young people and those with disabilities expressly addressed; and
 - iii. Facilities that provide an appropriate balance of internal and external play areas.
- In relation to the DCN, we would anticipate Bidders shall demonstrate how similar qualities to the above (ix (i – iii) but also in addition, how the design will be developed to achieve a nurturing, quiet and relaxing environment for its patients.

Submission Requirement

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary

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Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C2. Clarity, robustness and quality of approach to design quality
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 1.85
 Pre-Score Pass/Fail Outcome:

Bidders must submit proposals setting out their approach to achieving design quality. This must be provided as set out in C2.1 – C2.3 below:

- Submission Ref C2.1**
 Bidders must submit proposals setting out how the design will be developed to integrate the architectural, mechanical, electrical and civil and structural engineering aspects of the design to present a cohesive innovative design which meets all the Board's construction and stakeholders' requirements (including infection control and HAI Scribe requirements). The submission shall utilise all Mandatory Reference Design Requirements to deliver a solution across all disciplines.
- Submission Ref C2.2**
 Bidders must submit proposals setting out their design analysis of both the site and the Board's requirements as depicted in the Board's Construction Requirements. The review of the site shall identify, as a minimum, opportunities, constraints and access and planning issues.
- Submission Ref C2.3**
 Bidders must submit proposals setting out a clear statement summarising what they understand to be the key strategic issues relating to the project and demonstrate how the design proposals have dealt with these specific project issues, and any impact their proposals will have on such matters.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Score	Scoring Guidance
Overall Comment			5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.

	NOT SCORED AT DRAFT FINAL TENDER	6-7	The Bidder's approach: <ul style="list-style-type: none"> • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9	The Bidder's approach: <ul style="list-style-type: none"> • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10	The Bidder's approach: <ul style="list-style-type: none"> • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C3. Clarity, robustness and quality of architectural and landscape design
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.64
 Pre-Score Pass/Fail Outcome:

Bidders must submit proposals setting out their approach to architecture and landscape design. This should be provided as set out in C3.1 – C3.3 below:

Submission Ref: C3.1
 Bidders must submit proposals setting out their approach to architecture design. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:

- i. How the design will deliver world class architectural design practice in delivering Facilities that support the Board’s clinical needs and a design which provides a high level of creativity;
- ii. How the design will provide an ordered composition of building elements in a stimulating form that successfully combines good standards of space, height, form, scale and use of materials and colours / images with associated functional requirements and the surroundings;
- iii. How the design will address the interests of stakeholders, including (but not limited to) clinicians, patients (and their representatives, families and carers), health commissioners, Local Government, and the local community;
- iv. How the design will deliver architectural quality and demonstrates how this will be provided;
- v. How the design will deliver the lines of sight and views from windows which are suitable for children and young people;
- vi. How the design will provide age and ability appropriate art and way finding design which is integrated into the design solution;
- vii. How the design will fully consider all aspects of safety in all areas and a description of how risks have been removed through design innovations;
- viii. How the design will fully address control of infection and HAI Scribe; and
- ix. How the design will minimise cleaning and maintenance of all elements of the Facilities by choice of materials, layout and orientation and shows how such activities can be carried out safely and without disruption to clinical activities.

Submission Ref: C3.2
 Bidders must submit proposals demonstrating how they will deliver high quality architectural buildings, and high quality finishes and component parts. As well as the architectural drawings and supporting information, Bidders shall provide specific details in detailed specification format to include the following:

- i. Internal and external doors and door furniture, also showing proposed pattern of vision panels;
- ii. Washing and toilet facilities;
- iii. Reception desks and touchdown bases;
- iv. Communal patient areas, which include spaces such as playrooms, television rooms and quiet rooms
- v. External therapy gardens and external covered play and seating areas
- vi. Floor and wall coverings;
- vii. Natural and artificial lighting particularly in key public areas, artwork and key clinical areas such as theatres;
- viii. Samples of worktops and wall cupboards shall be provided for approval by the Board; and
- ix. Juxtaposition of main external finishes / cladding.

Submission Ref: C3.3
 Bidders must submit proposals setting out their approach to external hard and soft landscaping (including courtyards and therapy gardens) which shows how the design will be developed for therapeutic use and how it provides patient and staff access and how it enhances the environment of the Facilities. The proposals should demonstrate how the principle elements of external landscaping will be designed. to:

- i. Complement the RHSC and DCN buildings and the neighbouring RIE;
- ii. Minimise the risk of vandalism and crime;
- iii. Facilitate security of pedestrians and avoided ‘no-go’ areas in their design. Ensure site safety and link with the Green Travel Plan;
- iv. Minimise maintenance and operation costs;
- v. Ensure easy maintenance and cleaning whilst minimising health and safety issues;
- vi. Provide appropriate fire safety routes for all users;
- vii. Incorporate SUDS and other sustainable features;
- viii. Incorporate art work; and
- ix. Incorporate lighting, heating, seating, canopy and wind protection arrangements which are appropriate for young children and less disabled people.

For indicative purposes only it is anticipated that Bidders proposals may include (but shall not necessarily be limited to) those items listed in (i) – (ix) above.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer’s Comment

ITPD Evaluation Proforma

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C3. Clarity, robustness and quality of architectural and landscape design

<p>Scope and Level of Detail Description of scope and level of detail provided in proposal</p>	
<p>Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the</p>	
<p>Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.</p>	
<p>Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.</p>	
<p>Additional Information List here any additional information/clarifications to be sought.</p>	

Summary	Overall Comment	Score	Scoring Guidance								
		<p>NOT SCORED AT DRAFT FINAL TENDER</p>	<table border="1"> <tr> <td data-bbox="1564 1525 1638 1721" style="text-align: center;">5</td> <td data-bbox="1638 1525 2026 1721"> The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements. </td> </tr> <tr> <td data-bbox="1564 1721 1638 1988" style="text-align: center;">6-7</td> <td data-bbox="1638 1721 2026 1988"> The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements </td> </tr> <tr> <td data-bbox="1564 1988 1638 2181" style="text-align: center;">8-9</td> <td data-bbox="1638 1988 2026 2181"> The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements. </td> </tr> <tr> <td data-bbox="1564 2181 1638 2395" style="text-align: center;">10</td> <td data-bbox="1638 2181 2026 2395"> The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements </td> </tr> </table>	5	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.	6-7	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements	8-9	The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.	10	The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements
5	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.										
6-7	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements										
8-9	The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.										
10	The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements										

Status	Review Stage	Reviewer	Date

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C4. Clarity, robustness and quality of approach to delivering innovation
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.64
 Pre-Score Pass/Fail Outcome:

Submission Ref: Bidders must submit proposals setting out their approach to delivering innovation. This should be provided as set out in C4.1 – C4.4 below:
 Submission Requirement: C4.1
 Bidders must submit proposals setting out where it will be, or has been possible to provide innovative solutions to meet the Board’s requirements. Innovation in design can range from whole concepts of hospital planning, distribution of functions etc to the building solution (e.g. use of prefabricated units) to detail design of components, materials, spaces, use of technology and art etc. Bidders must show how their design reflects current and developing innovations in healthcare delivery and construction generally and translate these into an innovative building solution.
 Submission Requirement: C4.2
 Bidders must submit proposals setting out how their design, using innovation, will optimise the sustainability of the Facilities. Bidders must provide details of their strategy to show how it will optimise energy, water and utility consumption, minimise waste production, implements a strategy to meet the Board’s BREEAM requirements including carbon reduction and other positive activities described in the Board’s Construction Requirements to provide a sustainable development.
 Submission Requirement: C4.3
 Bidders must submit proposals setting out how an innovative approach to the provision of ICT in the Facilities in line with the Board’s Construction Requirements and FM Output Specifications has been delivered.
 Submission Requirement: C4.4
 Where areas of innovation are identified Bidders must submit supporting evidence, where possible, with examples from other schemes where this has proved successful. Bidders must provide information to show the benefit, cost and risk for each innovation so the Board can assess them separately.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary	Overall Comment	Score	Scoring Guidance

<p>NOT SCORED AT DRAFT FINAL TENDER</p>	5	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
	6-7	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
	8-9	The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
	10	The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C5. Clarity, robustness, and quality of approach to adaptability and flexibility.
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.64
 Pre-Score Pass/Fail Outcome:
 Submission Ref: Bidders must submit proposals setting out their approach to adaptability and flexibility. This should be provided as set out in C5.1 and C5.2 below:
 C5.1
 Submission Requirement: Bidders must submit proposals setting out an adaptability strategy which shall describe what features have been incorporated to facilitate future adaptation of use and/or expansion, technological changes, changes in national policy, national and local planning, clinical advancement and seasonal or future strategic variations in use. It is expected that particular reference shall be made to potential changes in the delivery of surgical and radio diagnostic services given the rapid evolution of developments in these disciplines. All design disciplines i.e. architectural, mechanical and electrical, structural and environmental, must be considered.
 Submission Ref: C5.2
 Submission Requirement: Bidders must submit proposals setting out their approach to adaptability and flexibility. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:
 i. How the interior spaces may be re-arranged in future if a change of use were to occur;
 ii. How the building's services and external infrastructure have been designed to allow this adaptability;
 iii. How the building structure and envelope, services, partitioning, ceiling, and flooring systems and construction technique has been designed to allow this adaptability;
 iv. How the main electrical installations can accommodate changes over and above the 25% capacity increase (requested in Section 3 Board's Construction Requirements) with minimal structure disruption; and
 v. How the environmental services strategy will co-ordinate with the adaptability and flexibility strategy.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or + proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: + demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or + proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: + demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C6. Clarity, robustness and quality of way finding and signage proposals
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 1.06
 Pre-Score Pass/Fail Outcome:
 Submission Ref: C6.1

Bidders must submit proposals demonstrating their way finding strategy. For indicative purposes only it is anticipated that Bidders proposals may include (but shall not necessarily be limited to) how it has been developed to:

- i. Suit the needs of the particular patient mix for the Facilities i.e. children, young people and adults using different services, as well as staff and visitors;
- ii. Include internal and external signage and signage outside the site boundary relevant to the Facilities. External signage shall include proposals for the wider RIE site, pedestrians, vehicles and street signage;
- iii. Integrate with the art strategy and lighting strategy for the Facilities;
- iv. Take cognisance of patient journey times and take steps to minimise such journey times;
- v. Minimise the transmission of micro-organisms and separates clean and contaminated traffic and material streams;
- vi. Include hand hygiene signage;
- vii. Include no smoking signage;
- viii. Make reference to sample or exemplar site information provided by The Board; and
- ix. Make use of signage in the floor.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix E

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C7. Clarity, robustness and quality of interior design proposals
Quality Evaluation Basis	Scored
Quality Evaluation Criteria Weighting	2.64
Pre-Score Pass/Fail Outcome	
Submission Ref	<p>Bidders shall submit their interior design proposals. This must be provided as set out in C7.1 and C7.3 below:</p> <p>C7.1</p> <p>For both the RHSC and DCN sectors of the Facilities Bidders must submit proposals setting out how their design has been developed to include:</p> <ul style="list-style-type: none"> i. Interior design proposals and illustrations for each distinct area of the Facilities, paying particular attention to the interior design solutions for public, patient and key staff areas; ii. Communal patient areas that are light, spacious and provide a welcoming atmosphere and which are domestic in design and ambience with the main entrance being immediately apparent; iii. Public areas which are restful, open and well lit with natural light and have views out to landscaped spaces that add quality and orientation; iv. An open and friendly environment, that shall ensure privacy and dignity for patients, family members and visitors when required; v. The incorporation of art in the proposals. Bidders shall provide the name(s) of the artists whom will undertake the work; vi. Integration with their lighting strategy and equipment strategy; vii. Integration with maintenance, cleaning, operation and sustainability; viii. Integration with way finding and signage proposals and how the way finding and signage within the RHSC and DCN links with the way finding within the existing RIE; ix. How the interior materials within the Facilities match the furniture, furnishings and equipment being procured by the Board; and x. Facilities which have a safe and secure environment which is not created via visible security features e.g. security cameras. Safety in design shall also take consideration of anti-ligature, child safety, and Child and Adolescent Mental Health Service whilst maintaining access and ambience. <p>For indicative purposes only it is anticipated that Bidders proposals may include (but shall not necessarily be limited to) those items listed in (i) – (x) above.</p>
Submission Requirement	
Submission Ref	<p>C7.2</p> <p>Bidders must submit proposals setting out how their interior design for the RHSC has been developed to provide:</p> <ul style="list-style-type: none"> i. Age and ability appropriate signage throughout the Facilities; ii. A nurturing, relaxed and safe environment in the patient, communal and public areas; and iii. Furniture, windows and lines of sight which are appropriate for young children and children in pushchairs and wheelchairs
Submission Requirement	
Submission Ref	<p>C7.3</p> <p>Bidders must submit proposals setting out how their interior design submission for the DCN provides a nurturing, quiet and relaxed environment in the patient, communal and public areas.</p>
Submission Requirement	
Lead Reviewer(s):	
Support Reviewer(s):	

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	

ITPD Evaluation Proforma

Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C7. Clarity, robustness and quality of interior design proposals

Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	Confidential
Additional Information List here any additional information/clarifications to be sought.	

Summary	
Overall Comment	Score
	5
	6-7
	8-9
	10
NOT SCORED AT DRAFT FINAL TENDER	

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix E

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C8. Clarity, robustness and quality of M&E engineering design proposals
Quality Evaluation Basis	Scored
Quality Evaluation Criteria Weighting	1.06
Pre-Score Pass/Fail Outcome	
Submission Ref	C8.1 Bidders must submit proposals setting out their approach to M&E engineering services design. This must be provided as set out in C8.1 – C8.3 below:
Submission Requirement	Bidders must submit proposals setting out the engineering services design for each element of the scheme in sufficient detail to demonstrate compliance with the Board's Construction Requirements. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following: i. An engineering design, control and operational philosophy statement; ii. Details of principal M&E system selections; iii. The definition of plant areas and zones both internal and external to the Facilities; and iv. Schematics and written proposals for major plant provision.
Submission Ref	C8.2 Bidders must submit proposals setting out how their design will be developed to include the following: i. Building services which support the Board's business, safety and security and life critical services under supply failure scenarios. Specific details shall be provided relating to standby facilities and mains service redundancy; ii. An autonomous energy centre and associated plant; iii. How temperature, ventilation and comfort for occupants will be maintained in accordance with the minimum criteria and how, if possible, these criteria will be improved; iv. How the quality of the environment and prevention of sick building syndrome shall be ensured; v. How mechanical and electrical design is integrated with architectural, structural and civil aspects as outlined above in C2 and C4; vi. How sustainability has been incorporated into their design, including details of the maintenance and operation philosophy for all mechanical and electrical equipment; vii. Proposals for external services, including details of the main routes (including proposed connections to existing services), intakes and off-site reliance of these services and how this interfaces with adjacent sites (this is also discussed in C18 below); viii. Details of the main source of heating energy; and ix. Details of mechanical and electrical innovations including costs as described in C4.
Submission Requirement	The following information should be also be provided to help demonstrate the design proposals noted above, including: x. An environmental conditions / room provisions matrix for both mechanical and electrical services for each room in the Facilities; and xi. Major plant life cycle statements and design life, including an explanation of the Bidder's lifecycle philosophy to support the lifecycle costing analysis completed in the technical costs proforma;
Submission Ref	C8.3 Whilst Bidders are required to undertake their own design, the Board has provided a draft Environmental Matrix as part of the ITPD documentation. Bidders must confirm acceptance of the Board's Environmental Matrix, highlighting any proposed changes on an exception basis.
Submission Requirement	
Lead Reviewer(s):	
Support Reviewer(s):	

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	

ITPD Evaluation Proforma

Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C8. Clarity, robustness and quality of M&E engineering design proposals

Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
<p style="font-size: 2em; opacity: 0.3; transform: rotate(-30deg);">Confidential</p>	<p style="color: red; font-weight: bold;">NOT SCORED AT DRAFT FINAL TENDER</p>	5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C9. Clarity, robustness and quality of natural and artificial lighting proposals
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 1.06
 Pre-Score Pass/Fail Outcome:
 Submission Ref: C9.1

Submission Requirement: Bidders must submit proposals setting out their approach to natural and artificial lighting within the Facilities. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:
 i. The balance of natural and artificial light;
 ii. How the environment created by the lighting design will support the well being of patients, carers, visitors and staff;
 iii. How it will be functional for clinical use;
 iv. How it will produce an aesthetically pleasing environment;
 v. How it will be co-ordinated with the building structure and how it will integrate with other areas e.g. mechanical and electrical design, interior design and architecture;
 vi. How it will include sustainability and energy efficiency;
 vii. How the interior lighting philosophy will include room usage and warning signs, night lighting, security emergency signage and emergency lighting, lighting control and wiring philosophy, standby lighting; and
 viii. How the external lighting philosophy will minimise light pollution for the neighbours including the RIE, assist to minimise vandalism, assist to improve security, and take account of local residents' needs.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C10. Clarity, robustness and quality of energy management proposals
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 1.85
 Pre-Score Pass/Fail Outcome:
 Submission Ref: C10.1

Bidders must submit proposals setting out their approach to energy management. This should be provided as set out in C10.1 and C10.2 below.

Bidders must submit an energy model, complete with supporting information, demonstrating how their design solution will achieve an optimum level of energy and utility conservation (linked with the requirement for a sustainable development in C4) and show that their design fulfils the following:

- The building energy performance will achieve a minimum of 6 credits for ENE.01 in the BREEAM assessment.
- The water consumption for the Facilities will not exceed 170,000 litres/bed/annum (Part 6 Section 3: The Board's Construction Requirements);
- 20% of energy is provided by renewable energy sources (Part 6 Section 3: The Board's Construction Requirements); and
- The inclusion of passive design strategies for ventilation and thermal control. The environmental control system is to be co-ordinated and integrated with the design of the structure and the occupied areas in order to maximise the control and flexibility of the installations.

Submission Requirement: In addition Bidders must submit an analysis of their design solution which demonstrates energy consumption proposals along with cost estimates of specific measures or innovations to be introduced.

Submission Ref: C10.2

Submission Requirement: For information purposes only in addition to the model referred to above a dynamic thermal energy model is to be submitted which should comply with the parameters set out in Appendix F of the ITPD Volume 1.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
		The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements. 5
		The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements. 6-7
		The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well against the Board's requirements. 8-9
		The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements. 10
	NOT SCORED AT DRAFT FINAL TENDER	

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C11. Clarity, robustness and quality of equipment proposals
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 1.06
 Pre-Score Pass/Fail Outcome:
 Submission Ref: Bidders must submit proposals setting out their approach to equipment. This must be provided as set out in C11.1 and C11.2 below.
 C11.1

Submission Requirement: Bidders must submit the following: :
 i. A commentary showing how the Group 1 Equipment scheduled by the Board varies from their own assessment of Group 1 Equipment needs. This shall be done by providing a mark-up of the Group 1 Equipment included in Equipment Schedule contained in Volume 3 of the ITPD. It should be noted that the quantity of Group 1 Equipment specified by the Board is considered to be a minimum;
 ii. A commentary on any aspect of the proposed equipment responsibilities regime suggested in paragraph 2.15 (Equipment) of the ITPD Volume 1, that is not considered to represent best value to the Board, and suggestions as to alternative profiles of responsibility, if any, that may enhance this;
 iii. A commentary setting out their proposals to select equipment suppliers and how the required level of quality is to be achieved in the equipment for which they will be responsible for supplying and any improvement in the level of quality being proposed. Samples of worktops and wall cupboards shall be provided for approval by the Board to support this; and
 iv. Their approach to working alongside the Board to allow the Groups 2A, 2B and 3 Equipment to be installed and how this process will be managed.

Submission Ref: C11.2
 Submission Requirement: Bidders must submit a fully priced Schedule of Group 1 Equipment, the total sum for which should be clearly identifiable in the Technical Cost Proforma requested at C29 below.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
		5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements
	NOT SCORED AT DRAFT FINAL TENDER	

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C11A Compliance with minimum level of Group 1 Equipment
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C11A.1
 Submission Requirement: Bidders must provide confirmation that they will comply with the minimum level of Group 1 Equipment as set out in the Equipment Schedule and Equipment Responsibility Matrix.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C12. Compliance With Mandatory Reference Design Requirements
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a

Submission Ref: C12.1
 Submission Requirement: Bidders must submit proposals demonstrating how their design complies with the Mandatory Reference Design Requirements.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C13. Acceptable approach to achieving planning permission
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: Bidders must submit proposals setting out their approach to achieving planning permission. This must be provided as set out in C13.1 and C13.2 below.
 Submission Requirement: Bidders must submit proposals demonstrating compliance including a methodology for achieving planning approval accordance with paragraph 2.17 of Volume 1 of the ITPD. This should include the following:
 i. Community requirements;
 ii. Policy of the local planning authority;
 iii. Development Framework requirements; and
 iv. "Good neighbourliness".
 Submission Ref: C13.2
 Submission Requirement: Bidders are required to (in conjunction with the Board) participate in planning consultation meetings with the City of Edinburgh Council regarding planning requirements. From these consultations Bidders must submit evidence to demonstrate that the granting of approvals for the scheme will be achieved in the Preferred Bidder stage and confirm any perceived obstacles / project risks (both known and unknown) in this regard shall be clearly drawn to the Board's attention.
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that the granting of approvals for the scheme will be achieved
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
		5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
	NOT SCORED AT DRAFT FINAL TENDER	6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C14. Acceptable vertical and horizontal movement strategy
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: Bidders must submit proposals setting out their vertical and horizontal movement strategy. This must be provided as set out in C14.2 – C14.3 below. C14.1
 Submission Requirement: Bidders must submit proposals setting out a coherent strategy which shows how their design has been developed for managing different categories of traffic and materials within the Campus Site. This shall include the movement of people and vehicles and the distribution of supplies and waste and the separation of clean and contaminated traffic and materials during transportation, storage and at drop off points.
 Submission Ref: C14.2
 Submission Requirement: Bidders must submit proposals setting out how their design has been developed to minimise travel time and distances for patients, staff, and material transmission of micro-organisms either through airborne or other means to support and segregate a natural flow of pedestrian and vehicular traffic.
 Submission Ref: C14.3
 Submission Requirement: Bidders must submit proposals setting out how their design has been developed to include a strategy for the following:
 i. Wheelchair users, less able users and transportation of small children and babies that will use the Facilities;
 ii. Incorporation of fire fighting lift(s) to maintain evacuation use for the less able, small children and babies in an emergency situation; and
 iii. The route required by people and materials from the helipad, the RIE and the Facilities.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C15. Acceptable ICT strategy and Bidders proposals, compliant with Board's requirements
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: Bidders must submit proposals setting out their approach to a compliant ICT strategy. This must be provided as set out in C15.1 – C15.4 below.
 Submission Requirement: C15.1 Bidders must submit proposals setting out their ICT strategy and demonstrating an understanding of the Board's requirements for information management and technology (M&T).
 Submission Ref: C15.2 Bidders must submit proposals setting out a detailed methodology demonstrating how it will ensure compliance with the Board's Construction Requirements, define clear interfaces of responsibility as necessary, and how they will take overall responsibility for the coherence and compatibility of systems such that they will operate to suit the Board's needs.
 Submission Requirement: C15.3 Bidders must submit proposals setting out the number, location size and specification of IT / communications rooms.
 Submission Ref: C15.4 Bidders must submit proposals setting out how the Board's routing, fire suppression, ventilation and connectivity to the RIE requirements has been specifically addressed.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

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Appendix E

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C16. Acceptable fire planning strategy
Quality Evaluation Basis	Pass / Fail
Quality Evaluation Criteria Weighting	n/a
Submission Ref	C16.1
Submission Requirement	Bidders must submit proposals setting out their strategic fire strategy, demonstrating how the design will be developed to consider fire compartmentation and horizontal and vertical evacuation strategies.
Submission Ref	C16.2
Submission Requirement	<p>Bidders must submit proposals setting out how their fire planning strategy has been developed. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:</p> <p>i. The implications on staff and users in the event of a fire;</p> <p>ii. A clear understanding of the policies and principles underlying fire safety in NHS premises, compliance with NHS policies and principles and full agreement and coordination with Lothian and Borders Fire and Rescue Service, The CEC Council's Building Control Department and the Board's Fire Officer;</p> <p>iii. Compliance with: The Building (Scotland) Regulations 2004 and The Building (Scotland) Amendment Regulations 2011, SHTM 81 and SHTM 82;</p> <p>iv. How a Fire Engineering solution has been developed (if it has been proposed), to what extent it has been agreed with the regulatory authorities and how the Board will not be exposed to any additional risks (programme, quality or cost) should the solution need to be amended or abandoned during the course of the development and finalisation of proposals;</p> <p>v. Integration of their fire strategy with the fire strategy for the RIE Facilities to ensure they are compatible and operate in conjunction and how the fire strategy issues at the Link with the RIE Facilities are to be addressed;</p> <p>vi. Details of external and internal access and circulation routes, including a safety and security statement for each element of the scheme with particular reference to the different patient types using the Facilities; and</p> <p>vii. Details of how the particular issues in the surrounding areas of high fire risk such as the helicopter landing pad are to be addressed.</p>

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Score	Scoring Guidance
Overall Comment			<p>5</p> <p>The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.</p>
		NOT SCORED AT DRAFT FINAL TENDER	<p>6-7</p> <p>The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements</p>
			<p>8-9</p> <p>The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well against the Board's requirements.</p>
			<p>10</p> <p>The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements</p>

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C17. Acceptable structural design proposals
Quality Evaluation Basis	Pass / Fail
Quality Evaluation Criteria Weighting	n/a
Submission Ref	Bidders must submit proposals setting out their approach to structural design. This must be provided as set out in C17.1 - C17.3 below.
Submission Requirement	C17.1 Bidders must submit proposals setting out a statement of the structural design philosophy which shall demonstrate how their design has been developed including a methodology for ensuring a safe, aesthetically pleasing and durable structure.
Submission Ref	C17.2 Bidders must submit proposals relating to the following elements:
Submission Requirement	i. Substructure; ii. Structural frame solution, including grid arrangements; iii. Ground, suspended floor slab and roof construction; iv. External wall and internal partition construction; v. Fire protection strategy and proposed methods to be adopted ; and vi. Methods for dealing with floor penetrations both during new build works and to accommodate future potential needs.
Submission Ref	C17.3 Bidders must submit the following:
Submission Requirement	i. A schedule and/or drawings demonstrating the dead and imposed loading design criteria (both uniformly distributed and concentrated loads) adopted for all areas of the Facilities; ii. Specification of construction and materials to be utilised in the hard external works e.g. roads, pavements etc.; iii. Details of their proposals for co-ordinating structure with space requirements and distribution of services taking into account maintenance and replacement during the operational life of the buildings; iv. Details of opportunities for the future expansion of Clinical Services and Non-Clinical Services. The Bidders shall ensure that the physical arrangement of the Facilities allows for growth and change of clinical services in the future, as far as is practical for example partition moves and additional service runs both vertically and horizontally. The cost implications of structural solutions to future proof the Facility by creating 'soft spots' (refer also to C5 above) shall also be included; and v. A detailed description of the design of the drainage system, taking into account matters such as the design itself, allowable discharge into the public sewers, the need or otherwise for surface water attenuation and the incorporation of drainage to existing buildings within the site drainage proposals.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary			
Overall Comment	Score	Scoring Guidance	
		5	The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7	The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or + proposes a solution which performs well against the Board's requirements
		8-9	The Bidder's approach: + demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or + proposes a solution which, performs very well against the Board's requirements.
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Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C18. Acceptable services, utilities and infrastructure proposals
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C18.1

Submission Requirement: Bidders must submit proposals setting out their mains service infrastructure strategy for the site, and defines principal service routes external to the buildings. This shall also demonstrate adequacies of capacities including details of these provided by Utility providers.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
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Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or + proposes a solution which performs well against the Board's requirements
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				10 The Bidder's approach: + demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C19. Acceptable approach to achieving required BREEAM rating
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: Bidders must submit proposals setting out their approach to achieving the required BREEAM rating. This must be provided as set out in C19.1 and C19.2 below.
 Submission Requirement: Bidders must submit a draft BREEAM assessment of their proposals with supporting commentary. Bidders shall demonstrate how they will achieve, as a minimum, a "Very Good" rating in line with the requirements for healthcare facilities as set out in the BREEAM Scheme Document for New Construction (SD5073) 2011.
 Submission Ref: C19.2
 Submission Requirement: Where assumptions with respect to certain elements within these assessments have to be made (i.e. such details that would ordinarily be developed during the Preferred Bidder or post Financial Close period) the basis for these assumptions, including substantiation, must be set out in the Bidders proposals.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
				5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
			NOT SCORED AT DRAFT FINAL TENDER	6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C20. Acceptable post Preferred Bidder stage design development proposals and design programme
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a

Bidders must submit proposals setting out their approach to design development and design programme. This must be provided as set out in C20.1 and C20.2 below.

Submission Ref: C20.1

Bidders must submit proposals setting out their approach to be adopted to manage the design process (taking account of the design review procedures to be implemented). For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:

Submission Requirement

- i. Further development of 1:500, 1:200 and 1:50 design drawings and other design details and how these will be developed in conjunction with the Board's project team, user groups, specialist advisers and other project stakeholders, to achieve sign off to the proposals;
- ii. Further development of the specifications and engineering related drawings and how these will be developed in conjunction with the Board's project team to achieve sign off of the proposals;
- iii. The anticipated level of involvement that the Board will have in the design development process, and the number of main design iterations anticipated;
- iv. Outline proposals for change control, confirmation of technical queries and other design related management tools; and
- v. Further development of interior design proposals to the satisfaction of the Board incorporating patient groups.

Submission Ref: C20.2

Bidders must submit a design programme to Financial Close and thereafter to design completion. This shall:

Submission Requirement

- i. Show the proposed programme for the development of the design drawings and specifications (supplemented by samples and models as appropriate) and other technical schedules to the NPD Project Agreement;
- ii. Clearly indicate the expected number of design drawings and specifications;
- iii. Clearly define periods allowed for the Board's consideration of proposals; and
- iv. Demonstrate how and when sign off of the Board's Construction Requirements will be achieved in this period by the Preferred Bidder, and how this sign off relates to development and sign off of Project Co Proposals.

Pass / Fail Guidance

To Pass, Bidders will be required to demonstrate clear proposals setting out a robust process, supported with a logical and deliverable programme, for the development process both up to, and beyond, Financial Close.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C20. Acceptable post Preferred Bidder stage design development proposals and design programme

Additional Information List here any additional information/clarifications to be sought.	
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Summary	Overall Comment	Score	Scoring Guidance
		NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
			6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
			8-9 The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.
			10 The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C21. Compliance with Board's Construction Requirements
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: Bidders must submit proposals setting out their approach to architecture and landscape design. This should be provided as set out in C3.1 – C3.3 below: C21.1
 Submission Requirement: Bidders must confirm their compliance with the Board's Construction Requirements. If as their design has been developed there are specific areas of the Board's Construction Requirements that Bidders would seek to change, these shall be scheduled and provided in support of the statement. The Board shall not be required to accept any proposed amendments.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C22. Acceptable design life proposals
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C22.1
 Submission Requirement: Bidders must submit a schedule of design life proposals against the elements listed in section 5.1 (Schedule of Life Expectancies) of the Board's Construction Requirements.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

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Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C23. Acceptable construction programme and approach to monitoring
Quality Evaluation Basis	Pass / Fail
Quality Evaluation Criteria Weighting	n/a
	Bidders must submit proposals setting out their construction programme and approach to monitoring. This must be provided as set out in C23.1 and C23.2 below.
Submission Ref	C23.1
	Bidders must submit a high level programme, for the Works, comprising a network and linked bar chart programme covering all of the main and key elements of design, construction, testing, commissioning and completion and covering the period from Financial Close to Post Completion Commissioning.
Submission Requirement	The programme must include as a minimum, the following information: i. Sequencing of activities showing logic links, restraints and constraints; ii. Key activity durations; iii. Critical paths, including the identification of critical dependencies of activities and float; iv. Key and other target milestones; v. Planning approval, and other statutory consents; and vi. Proposed Relevant Service Transfer Dates.
Submission Ref	C23.2
Submission Requirement	Bidders shall submit proposals setting out how they shall manage and monitor the programme, including their approach to minimising the effects of delays and unforeseen circumstances.
Pass / Fail Guidance	To Pass, Bidders will be required to demonstrate a logical and deliverable construction programme supported with a robust process for programme management.
Lead Reviewer(s):	
Support Reviewer(s):	

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
				5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
			NOT SCORED AT DRAFT FINAL TENDER	6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C24. Clarity, robustness and quality of construction methodology
Quality Evaluation Basis	Scored
Quality Evaluation Criteria Weighting	1.85
Pre-Score Pass/Fail Outcome	
Submission Ref	Bidders must submit their construction methodology proposals. This must be provided as set out in C24.1 - C24.10 below. C24.1
Submission Requirement	Bidders must submit proposals setting out in sufficient detail how they will deliver the development including their construction strategy, proposals and method statements. Bidders shall address in detail how the Works phase of the project will be managed including a methodology covering day to day management.
Submission Ref	C24.2
Submission Requirement	Bidders must submit proposals setting out in sufficient detail how they shall mitigate the egress of water, dust, debris or any microbiological contamination out of the Site and into adjacent buildings i.e. how they will ensure they are a considerate contractor.
Submission Ref	C24.3
Submission Requirement	Bidders must submit proposals setting out in sufficient detail how they will follow the provisions of Sections 60 and 61 of the Control of Pollution Act 1974, with reference to the control of noise due to any demolition or construction works in particular for works adjacent to an occupied property i.e. RIE and other occupiers of the wider estate.
Submission Ref	C24.4
Submission Requirement	Bidders must submit proposals setting out in sufficient detail how they will not only adhere to legal obligations but how they will ensure that "at all times the requirements and reasonable wishes and safety of the immediate neighbours to the Campus Site (including the Royal Infirmary of Edinburgh, Little France site) are respected" with particular consideration to key locations such as A&E and operating theatres.
Submission Ref	C24.5
Submission Requirement	Bidders must submit proposals to set out in sufficient detail how they will ensure that they will integrate with and not inhibit the RIE pedestrian, vehicular, cycle, service vehicular and emergency vehicular movements, access routes and parking during construction and during operation of the Facilities. The submission must set out how they will ensure site safety at all times.
Submission Ref	C24.6
Submission Requirement	Bidders must submit proposals, in sufficient detail, setting out how continuity of utility supplies and operational continuity of the immediate neighbours is to be maintained at all times. The Bidders submission shall also provide outage protocols in case these safeguards fail to protect the neighbours
Submission Ref	C24.7
Submission Requirement	Bidders must submit proposals, in sufficient detail, setting out a detailed methodology demonstrating their proposals for the safe and compliant disposal of surplus excavated material, all building spoil, demolition waste and rubbish.
Submission Ref	C24.8
Submission Requirement	Bidders must submit proposals of their site office set up. This shall describe in particular how they are to be serviced and how safe access and egress will be provided.
Submission Ref	C24.9
Submission Requirement	Bidders must submit proposals setting out in sufficient detail their approach to storage of materials. This shall describe in particular how materials will be delivered to, stored, and then transferred to the Site for incorporation in the Works.
Submission Ref	C24.10
Submission Requirement	Bidders must submit proposals setting out in sufficient detail their construction phasing and access methodology which shall demonstrate how the proposals have been developed to address the Site constraints and interfaces with the wider site. Bidders must include their proposals for creation of a temporary construction access over the Yellow Area (as shown on Plan 2). Bidders must submit details of location of access and methodology for its construction. This will form part of the management procedures for the Works as regards satisfying town planning matters as detailed in the ITPD. Further details are set out in paragraph 1 (Construction Access over Yellow Area) of Section 1 of Part 1 of Appendix A of the Board's Construction Requirements.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C24. Clarity, robustness and quality of construction methodology

<p>Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the</p>	
<p>Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.</p>	
<p>Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.</p>	
<p>Additional Information List here any additional information/clarifications to be sought.</p>	

Summary

Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C25. Acceptable approach to commissioning and handover
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C25.1

Bidders must submit proposals setting out a commissioning programme, supported by a methodology demonstrating how this will be developed and agreed in conjunction with the Board. For indicative purposes only it is anticipated that Bidders proposals may include (but shall not necessarily be limited to) how they will provide the following:

- i. Management of interfaces with the Board and the Board's contractors and other parties e.g. Consort for the Link Building and obtaining such other parties consents/approvals as required;
- ii. How they will carry out commissioning activities both before and after the Actual Completion Date;
- iii. Access for the Board during the Works including access for equipment installation (Groups 2A, 2B and 3) and the Board's Contractors;
- iv. A "zero defects" culture in order to deliver the scheme with few or no snagging items at the Actual Completion Date. Bidders shall outline a contingency plan for investigating and rectifying any defects which could still occur despite all best endeavours of the Project Co. In addition proposals should be submitted outlining how snagging items will be closed out after the Actual Completion Date;
- v. Facilities handover including how they shall interface and assist the Board with their decanting, familiarisation and training for the Facilities and proposals on how they shall work closely with the Board in developing an occupation plan;
- vi. Facilities which are "Clinically Clean" to the satisfaction of the Board's Head of Service Infection Control. Bidders shall demonstrate within their response:
 - How they propose to interface with the Board's Head of Service Infection Control to agree the process and standards required to achieve the appropriate level of clinical cleanliness for each location within the Facilities;
 - How this will be managed in terms of the sign-off of the Facility and handover process;
 - How this will conform with HAI Scribe; and
 - Details of any specialist contractors that may be used as part of this process.

Submission Requirement

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C25. Acceptable approach to commissioning and handover

Summary		
Overall Comment	Score	Scoring Guidance
<p style="font-size: 2em; opacity: 0.3; transform: rotate(-30deg);">Confidential</p>	<p>NOT SCORED AT DRAFT FINAL TENDER</p>	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C26. Acceptable approach to quality and environmental management systems
Quality Evaluation Basis	Pass / Fail
Quality Evaluation Criteria Weighting	n/a
Submission Ref	C26.1

Bidders must submit proposals setting out their approach to construction quality and environmental management systems. For indicative purposes only it is anticipated that Bidders proposals must include (but should not necessarily be limited to) the following:

- i. Confirmation that they will complete the Works in accordance with the requirements of BS EN ISO 9001 and 14001 or any equivalent standard;
- ii. Details of proposed quality assurance and environmental management systems (i.e. a system synopsis);
- iii. Details of their approach to developing the quality and environmental management systems, including key dates;
- iv. Where individual quality and environmental management systems of the designers, contractor, service provider and Project Co are to be used, a statement regarding how these separate systems will be integrated to form a coherent overall quality management system. For the avoidance of doubt, the Board requires Project Co (in addition to their sub-contractors) to adopt and implement a compliant system;
- v. Details of their approach for monitoring quality during construction (this may be by reference to a similar system implemented on a similar scheme); i.e. compliance with current revisions of BS 8000: Series "Workmanship on Building Sites, BS 5606:1990 "Guide to Accuracy in Building". and other activities based on Good Industry Practice current at the time, as a minimum;
- vi. Details of their approach for auditing the quality and environmental management systems. This shall include details of the independent, internal and external audits of Project Co and its sub-contractors; and
- vii. A description of how the proposed systems will integrate with their strategies for risk mitigation.

Lead Reviewer(s):
Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C26. Acceptable approach to quality and environmental management systems

Overall Comment	Score	Scoring Guidance
<p style="text-align: center; opacity: 0.3; font-size: 48px; transform: rotate(-30deg);">Confidential</p>	<p>NOT SCORED AT DRAFT FINAL TENDER</p>	<p>5</p> <p>The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.</p>
		<p>6-7</p> <p>The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements</p>
		<p>8-9</p> <p>The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.</p>
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Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	C: Approach to Design and Construction (23%)
Submission Requirement Reference	C27. Acceptable approach to health and safety management
Quality Evaluation Basis	Pass / Fail
Quality Evaluation Criteria Weighting	n/a
Submission Ref	C27.1

Bidders must submit proposals setting out their health and safety management system. For indicative purposes only it is anticipated that Bidders proposals must include (but should not necessarily be limited to) the following:

- i. Confirmation that they will adopt and implement an accredited health and safety management system complying with the requirements of OHAS ISO 18001. For the avoidance of doubt the Board requires that Project-Co adopt and implement a compliant system;
- ii. Details of all proposed designers, sub-contractors, and suppliers confirming that they operate and accredited health and safety management system complying with OHAS 18001 standards covering all aspects of the project as applicable. Copies of current certificates from an accredited third-party assessment body showing that systems are compliant should be provided;
- iii. Details of the approach for auditing designers, contractors, sub-contractors and suppliers of their health and safety management systems. This should include details of internal, external and independent audits of Project-Co;
- iv. Proposals for managing occupational health that will be implemented;
- v. Key dates for development of the system;
- vi. Safety in design and how Bidders have removed risks through design innovations;
- vii. Potential constraints on their Works activities when considering the health and safety of their immediate neighbours and other members of the public that may be affected by the Works. This shall include construction traffic management plan within the Campus at Little France and restrictions on the movement of water, dust, vibration, noise and micro-organisms;
- viii. How any risks to health and safety will be managed and mitigated throughout the Works;
- ix. How they plan to deal with the potential occurrence of below ground services crossing the Site, in addition to the removal of other below ground obstructions that may still be present from previous demolition works;
- x. Methodology for the use of overhead cranes;
- xi. The removal of waste material;
- xii. Compliance with HAI Scribe;
- xiii. Storage, transportation and handling of gas cylinders (for construction use); and
- xiv. How their proposals facilitate the control and management of an outbreak and spread of infectious diseases in accordance with HTM 2025 and SHFN 30.

Submission Requirement

Lead Reviewer(s):
Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C27. Acceptable approach to health and safety management

Additional Information List here any additional information/clarifications to be sought.	
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Summary	Overall Comment	Score	Scoring Guidance
		NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
			6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C28. Acceptable approach to compliance with CDM regulations
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a

Bidders must submit proposals setting out their approach to achieving compliance with the CDM regulations. This must be provided as set out in C28.1 and C28.2 below.

Submission Ref: C28.1

Bidders must submit proposals setting out how they will comply with the requirements of the Construction (Design and Management) Regulations 2007. Particular reference shall be made to Project Co's role as Client, in addition to proposals to cover discharging the duties of CDM Coordinator, Designer and Principal Contractor under the Regulations. Bidders shall also include the methodology to demonstrate how they will deal with potential commercial and other conflicts between their constituent parts with respect to compliance with the Regulations and shall provide the following:

- i. A competency submission for the individual who will be leading the role of CDM co-ordinator, in accordance with CDM ACOP L144 "Managing Health and Safety in Construction";
- ii. A Health and Safety document to identify how the requirements of Appendix 4 of the ACOP L144 "Managing Health and Safety in Construction" will be applied on the project;
- iii. The format of the Pre- Construction Information relating to the project to address the requirements of Appendix 2 of the CDM ACOP L144 "Managing Health and Safety in Construction";
- iv. The contents and structure of the Construction Phase Plan relating to the project to address the requirements of Appendix 3 of the CDM ACOP L144 "Managing Health and Safety in Construction";
- v. Details of the induction process to address the requirements of section 184 and 185 of the CDM ACOP L144 "Managing Health and Safety in Construction";
- vi. The format to be used for the Health and Safety File to address the requirements of section 263 of the CDM ACOP L144 "Managing Health and Safety in Construction";
- vii. Details of the process for managing health and safety in Design including hazard elimination and risk reduction, principles of prevention, provision of information and management of the Design process as required by the CDM ACOP L144 "Managing Health and Safety in Construction".

Submission Requirement

Submission Ref: C28.2

Bidders must submit proposals setting out how they have complied with the CDM duties during the Dialogue Period and provide a design risk assessment which is to be updated as the design is progressed.

Submission Requirement

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C28. Acceptable approach to compliance with CDM regulations

Additional Information List here any additional information/clarifications to be sought.	
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Summary	Overall Comment	Score	Scoring Guidance
		NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
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Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C29. Robustness of technical costs
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C29.1

Submission Requirement: Bidders must submit fully completed technical cost proformas contained in the ITPD. All information requested must be provided. Bidders' completed proformas shall be provided in the same MS Excel format to allow direct comparison between bids.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that their technical costs are robust for the scope of works to be delivered.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C30. Acceptable list of summary assumptions, clarifications and derogations
 Quality Evaluation Basis: Not Scored
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C30.1
 Bidders must submit a consolidated schedule of all assumptions, clarifications and qualifications made in respect of their ITPD Bids. Whilst it is encouraged that such references are also made in the appropriate locations throughout Bidders' submissions, it is a mandatory requirement of the ITPD Submission that all such matters are also summarised in a single location.
 Submission Requirement
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: C: Approach to Design and Construction (23%)
 Submission Requirement Reference: C31. Acceptable Interface Proposals
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: C31.1
 Submission Requirement: Bidders must submit proposals setting out their approach to meeting the interface issues as described in Appendix A of the Board's Construction Requirements (subject to the conditions set out in Clause 9 (Nature of Land Interests) including without limitation Schedule Part 5 (Land Matters) of the NPD Project Agreement).
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
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Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
				5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
			NOT SCORED AT DRAFT FINAL TENDER	6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D1. Clarity, robustness and quality of approach to management and administration of the Services and Contract
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.5
 Pre-Score Pass/Fail Outcome:
 Submission Ref: D1.1

Bidders must submit proposals setting out their proposed approach to managing and administering both the Services and the NPD Project Agreement itself. The Bidder is also required to provide a detailed proposal for the management, liaison and interfacing with the Board and the other Board service providers, these being Authority Parties. The importance to the Board of a holistic approach to the delivery of Services under the NPD Project Agreement cannot be overstated. The success of this will be dependent upon the quality of the general management of the Project.

Bidders must submit the following:

- i. Full Method Statements for the management and administration of the Project Agreement and Services contained therein;
- ii. Location of the members of Project Co's administration team (i.e. on or off site);
- iii. Details of Bidder's proposed managerial structure, indicating the roles and responsibilities of each manager, supervisor and team member;
- iv. Details of how material changes to the management structure of Project Co will be communicated to the Board;
- v. Details of how changes to working practices and / or Service delivery timings will be communicated to the Board; and
- vi. Details of how it is proposed to electronically manage Services management and administration to improve delivery.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary			
Overall Comment	Score	Scoring Guidance	
	NOT SCORED AT DRAFT FINAL TENDER	5	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9	The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10	The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D2. Acceptable approach to integration with Board policies and operation
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D2.1

Submission Requirement: Bidders must submit proposals setting out how they will comply, integrate and align their methodologies with the Board's policies, operation and procedures for the delivery of Services to the Facilities. This must include the following:
 i. Details of how it will ensure that the Services are delivered in accordance with the requirements of the Health planning Standards/NHS Requirements as detailed within paragraph 2.3 of Volume 3 of the ITPD.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
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Status		
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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D3. Acceptable approach to ensuring quality management
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D3.1

Bidders must submit proposals setting out their Method Statements for quality management. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:
 i. Description of any quality management systems or policies the Bidder has for the Services or would put in place for the Services;
 ii. Interface with the Board's Quality Assurance representatives
 iii. Process to ensure that Project Co's advisers are continually aware of any relevant legislative changes and procedures for communicating these changes to the Board as appropriate;
 iv. Proposals for carrying out audits, including the provision of their proposed audit programme for the Services; and
 v. Details of the Bidder's proposals for the escalation of activities following a major incident including interface with the Board.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
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Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D4. Acceptable approach to ensuring environmental management
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D4.1

Bidders must submit proposals setting out their Method Statements for environmental management. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:

- i. Interface with the client's environment representatives;
- ii. Process to ensure that Project Co's advisers are continually aware of any relevant legislative changes and procedures for communicating these changes to the Board as appropriate;
- iii. Details of their approach to ISO 14001 and shall describe any relevant experience of implementing such systems for other local authority or NHS clients of the Bidder;
- iv. Bidder's environmental policy statement, and shall state explicitly whether they have, or are working towards developing an environmental strategy;
- v. Bidder's environmental management system, for their own organisation and/or for this project;
- vi. Structure of the environmental management system;
- vii. Details of the Bidder's approach and commitment to use of ethical and sustainable materials;
- viii. Proposals for carrying out audits, including the provision of an indicative audit programme for the Services; and
- ix. Details of the Bidder's proposals for the escalation of activities following a major incident, including interface with the Board.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
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Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D5. Acceptable approach to ensuring health and safety management
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D5.1

Bidders must submit proposals setting out their Method Statements for health and safety management. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:
 i. Procedure for disseminating hazard and safety warnings;
 ii. Methodology for the development and maintenance of the health and safety system relevant to the Services;
 iii. Interface with the Board's health and safety representatives;
 iv. Process for maintaining effective overall control of all site activities and the coordination of and liaison with all staff such that there are suitable integrated arrangements to allow compliance with the Health and Safety at Work Act 1974;
 v. Process to ensure that Project Co's advisers are continually aware of any relevant legislative changes and procedures for communicating these changes to the Board as appropriate;
 vi. Process to ensure constant access to health and safety professionals for both its own staff and the Board's nominated representatives;
 vii. Develop bespoke risk assessments recognising the services being delivered at the RIE and University on the wider Campus.
 viii. A copy of the Bidder's Health and Safety policy and a description of their approach to ISO 9001 and ISO 18001 or similar systems;
 ix. Proposals for carrying out audits, including the provision of an indicative audit programme for the Services; and
 x. Details of their proposals for the escalation of activities following a major incident including interface with the Board.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
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Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D6. Acceptable approach to interfacing with the Board for undertaking works outside of access times
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D6.1

Submission Requirement: Bidders must submit proposals setting out their approach to interfacing with the Board for undertaking works outside of access times. This must include the following:
 i. How they will ensure that any Works and Services proposed to be undertaken outside agreed Access Times are agreed with the Board's Representative prior to commencement; and
 ii. How Works and Services will be managed and carried out in accordance with Permit to Work System.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
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Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements		
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.		
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements		

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D7. Clarity, robustness and quality of approach to partnership and resources including liaison, resources and supply chain management
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.5
 Pre-Score Pass/Fail Outcome:

Bidders must submit proposals setting out their approach to partnership and resources including liaison, resources and supply chain management. This must be provided as set out in D7.1 – D7.3 below.

Submission Ref: D7.1
 Submission Requirement: Bidders must submit proposals setting out their approach to communications with the Board or its representatives. This shall include their proposed appropriate interfaces, frequency, nature and structure of meetings and reporting.
 Submission Ref: D7.2
 Submission Requirement: Bidders must submit proposals setting out:
 i. Details of storage, maintenance and disposal of plant, equipment, materials, consumables, packaging and chemicals used in the delivery of the Services;
 ii. Details of suitably qualified staff and availability to meet the requirements of this NPD Project Agreement.
 Submission Ref: D7.3
 Submission Requirement: Bidders must submit proposals setting out:
 i. Details of how the supply chain will be managed;
 ii. Proposed approach to delivery of Services through the supply chain;
 iii. Method of creating a successful integrated Services team.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
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Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
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Status		
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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D8. Acceptable approach to business continuity planning
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D8.1

Bidders must submit proposals setting out their approach to business continuity planning. This must include the following:
 i. Details of its approach to business continuity planning including:
 a. Its approach to the creation and maintenance of its own business continuity plan and disaster recovery plans for the required Services;
 b. The proposed approach to supporting the Board's "Business Continuity; and
 c. Details of who within the management team will have overall responsibility for business continuity.
 ii. Details of its proposed training procedures for staff who will participate in emergency procedures;
 iii. Details of its proposals for testing Business Continuity Plans at the property;
 iv. Details of its proposals for the escalation of activities following a major incident (and/or at the request of the Board);
 v. Details of its own, internal Business Continuity (e.g. those plans related to its own survival as a business following a major incident); and
 vi. Details of the existing arrangements for testing its own, internal Business Continuity Plans.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
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Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
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Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D9. Acceptable fire safety policies and procedures
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D9.1
 Bidders must submit proposals setting out their approach to fire safety policies and procedure. This must include the following:
 i. Details of its fire safety policy
 ii. Details of fire safety and security systems and procedures to be implemented on site including their approach to the Helipad.
 iii. Approach to ensuring an integrated fire safety strategy for the overall site, including appropriate interfaces with the Board and other Third Party organisations i.e. Authority Parties.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
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Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: + demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or + proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: + demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or + proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: + demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or + proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	D: Approach to Facilities Management
Submission Requirement Reference	D10. Clarity, robustness and quality of approach to performance and information management including; helpdesk, programme maintenance lifecycle, performance monitoring, monitoring and records, regular reports and information requests, building services and statutory testing
Quality Evaluation Basis	Scored
Quality Evaluation Criteria Weighting	4.5
Pre-Score Pass/Fail Outcome	
Submission Ref	D10.1
Submission Requirement	<p>Bidders must submit proposals setting out details of their proposed computer-aided facilities management (CAFM) system and how they will provide an asset management and reporting capability. For indicative purposes only it is anticipated that Bidders proposals must include (but should not necessarily be limited to) the following:</p> <ol style="list-style-type: none"> i. Call receipt and management and escalation; ii. Management information; iii. Reporting; iv. Incident management; v. Alarm management; vi. Maintenance scheduling; vii. Asset data maintenance; viii. Helpdesk interface protocol with the Board and/or third party's; ix. Proposed staffing and location of the helpdesk; x. Interface between the helpdesk and other aspects of the CAFM system; xi. Reporting procedures and frequency of reporting; and xii. Enabling the Board to gain access to the data held within the BMS in a format/method agreeable to the Board.
Submission Ref	D10.2
Submission Requirement	<p>Bidders must submit proposals setting out their approach to programme maintenance lifecycle. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:</p> <ol style="list-style-type: none"> i. The information and delivery strategy which will be utilised in establishing a Programmed Maintenance planner; ii. Confirmation that the Bidder recognises that certain works will need to be undertaken out of normal working hours/ during the weekends to minimise the impact on the Board's operations, and without additional cost to the Board; iii. Method of establishing and updating their 5-year Maintenance Lifecycle plan; iv. Details on the provision of all specialist sub-contractors for programmed maintenance and lifecycle; v. Details of how it will ensure that the delivery of all Services will underpin the required hygienic/infection control standards for the facility, specifically compliance with HAI Scribe standards; vi. Details on staffing and management of the Service; vii. Details on how planned, reactive and statutory works are to be monitored for both quality and safe methods of work. This should include works that are undertaken by directly employed staff and any sub-contractors; viii. Details of proposals to assess staff roles and responsibilities, skill requirements, competency, training arrangements and review procedures; ix. Details on its approach to planned, reactive and statutory maintenance including prioritising business critical equipment and systems at all premises together with details on how any planned maintenance that is not achieved by the planned date is addressed; x. Sample of proposed Service Report to be used for this Contract; xi. Details on interface with Board's cleaning service when carrying out Programmed Maintenance; xii. Schedule for cleaning of all internal and external panes of glazed areas of the Facilities envelope; and Schedule of planned external façade cleaning service.
Submission Ref	D10.3
Submission Requirement	<p>Bidders must submit proposals setting out details of their proposed delivery strategy and key activities. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following service areas:</p> <ol style="list-style-type: none"> i. Mechanical maintenance ii. Electrical maintenance iii. Plumbing iv. Lift maintenance v. Fire safety system/ equipment vi. Internal / external fabric of the Facilities vii. Periodic electrical testing and inspections viii. Lift inspections ix. Pressure vessel x. Pressure systems (written schemes) xi. Water systems risk assessments xii. Fire risk assessments xiii. Water sampling / testing

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Appendix E

Bidder:

Category:	Quality Evaluation Criteria
Sub Category:	D: Approach to Facilities Management
Submission Requirement Reference	D10. Clarity, robustness and quality of approach to performance and information management including; helpdesk, programme maintenance lifecycle, performance monitoring, monitoring and records, regular reports and information requests, building services and statutory testing
Submission Ref	D10.4 Bidders must submit proposals setting out their approach to performance monitoring. This must include the following:
Submission Requirement	i. Description of how the performance of the Service will be self-monitored; ii. Approach to customer feedback and complaints handling; iii. Sample customer feedback form.
Submission Ref	D10.5 Bidders must submit proposals setting out their approach to monitoring and records. This must include the following:
Submission Requirement	i. Details on how the Bidder will ensure all certificates, appropriate documentation and records in relation to the Project are stored in accordance with appropriate legislation and the Board's policies; and ii. Details on how the Bidder will ensure all records in relation to the Project are maintained accurately and kept up-to-date.
Submission Ref	D10.6 Bidders must submit proposals setting out their approach to regular reporting and information request. This must include the following:
Submission Requirement	i. Procedures for ensuring that the reports are appropriately tailored to the Boards requirements, including the completion period for such reports; ii. Details on how it will ensure that reports are accurate and produced in line with agreed timescales; iii. Details of the types of reports that they are currently producing for other clients.
Submission Ref	D10.7 Bidders must submit proposals setting out their approach to building services. This must include the following:
Submission Requirement	i. Approach to commissioning new Plant and Equipment; ii. Details on how hardware and software licenses will be kept up to date; iii. Details on how to ensure all Equipment/ Assets used in the delivery of the Services are maintained properly and safe to use.
Submission Ref	D10.8
Submission Requirement	Bidders must submit proposals setting out their approach to statutory testing.
Lead Reviewer(s):	
Support Reviewer(s):	

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D10. Clarity, robustness and quality of approach to performance and information management including; helpdesk, programme maintenance lifecycle, performance monitoring, monitoring and records, regular reports and information requests, building services and statutory testing

Additional Information List here any additional information/clarifications to be sought.	
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Summary	Overall Comment	Score	Scoring Guidance	
		NOT SCORED AT DRAFT FINAL TENDER	5	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
			6-7	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
			8-9	The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
			10	The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D11. Acceptable approach to un-programmed maintenance
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D11.1
 Submission Requirement: Bidders must submit proposals setting out their approach to Un-programmed Maintenance Works. This must include the following:
 i. Meeting the relevant Rectification Period; and
 ii. Meeting the standards required.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D12. Clarity, robustness and quality of approach to service elements including; utilities management and grounds maintenance services
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 2.5

Pre-Score Pass/Fail Outcome

Submission Ref: Bidders must submit proposals setting out their approach to service elements including utilities management and grounds maintenance. This must be provided as set out in D12.1 and D12.2 below.
 D12.1

Submission Requirement: Bidders must submit a detailed methodology describing their approach to utilities management. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:
 i. Proposals to ensure an adequate continuous supply of energy is available;
 ii. Proposals for interface with the Board to ensure no interruptions in the supply of Utilities to the Facilities;
 iii. Proposals for procurement of Utilities for the Board which demonstrate value for money;
 iv. Maintenance approach to ensure all external Utility infrastructures within the Site is fully functional;
 v. Method of monitoring Utilities/carbon consumption and how usage will be analysed and used;
 vi. Sample Utility consumption report;
 vii. Proposals for improving energy/ carbon efficiency; and
 viii. Details on Utility energy profile audit.

Submission Ref: D12.2
 Submission Requirement: Bidder must submit proposals setting out their approach to grounds maintenance. For indicative purposes only it is anticipated that Bidders proposals may include (but should not necessarily be limited to) the following:
 i. Methodology for Grounds Maintenance Service and indicative programme for Planned Maintenance; and
 ii. Interface with third parties in ensuring a holistic approach to the safe use of the Campus access and egress routes

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D12. Clarity, robustness and quality of approach to service elements including; utilities management and grounds maintenance services

Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary	
Overall Comment	Score
Confidential	Scoring Guidance 5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
	6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
	8-9 The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.
	10 The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements
NOT SCORED AT DRAFT FINAL TENDER	

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D13. Robustness of technical costs
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D13.1

Submission Requirement: Bidders must submit fully completed technical cost proformas for the Services contained in the ITPD. All information requested must be provided. Bidders' completed proformas shall be provided in the same MS Excel format to allow direct comparison between bids.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that their technical costs are robust for the scope of works to be delivered.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

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Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D14. Acceptable list of summary assumptions, clarifications and derogations
 Quality Evaluation Basis: Not Scored
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D14.1
 Submission Requirement: Bidders must submit a consolidated schedule of all assumptions, clarifications and qualifications made in respect of their ITPD Bids. Whilst it is encouraged that such references are also made in the appropriate locations throughout Bidders' submissions, it is a mandatory requirement of the ITPD Submission that all such matters are also summarised in a single location.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements

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Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: D: Approach to Facilities Management
 Submission Requirement Reference: D15. Acceptable approach to mobilisation of Facilities Management services
 Quality Evaluation Basis: Pass / Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: D15.1

Bidders must submit proposals setting out their approach to mobilisation of facilities management services. For indicative purposes only it is anticipated that Bidders proposals must include (but should not necessarily be limited to) the following:

- Submission Requirement
- i. A draft mobilisation plan using MS Project showing the activities to be performed, interdependencies between activities, the allocation of resources and where Board input is required;
 - ii. Details of their proposed structuring and resourcing for mobilisation. This should include the names and CVs of the proposed mobilisation management team, indicating relevant experience;
 - iii. Details of proposed communications with the Board during mobilisation. This shall propose appropriate interfaces and the frequency, nature and structure of meetings and reporting;
 - iv. Approach to recruitment of staff, including as appropriate relevant security clearances;
 - v. Detailed proposals for the establishment of the Helpdesk service that clearly demonstrates an understanding of the operational and technical interfaces with Board Services;
 - vi. Proposals for installation and population of the CAFM system describing (as applicable) how installation shall be effected and how data will be migrated and tested; and
 - vii. Method of vetting staff and acquiring the necessary and appropriate security clearances.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
		The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements. 5
		The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements. 6-7
		The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements. 8-9
		The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements. 10
	NOT SCORED AT DRAFT FINAL TENDER	

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B1. Clarity, robustness and quality of understanding of policy framework and approach to addressing these.
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.16
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B1.1

Submission Requirement: Bidders must submit proposals setting out their understanding of the relevant local and national health policies and describe how these strategic issues have been included within the Bidders' Final Tender submission, in particular with respect to the delivery of solutions specific to this Project.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate a clear understanding of national health policies specific to the Project.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the output specification?	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements		
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.		
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.		

Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B2. Clarity, robustness and quality of approach to contribution to delivering the Board's 'vision' and associated performance management regime
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.32
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B2.1
 Submission Requirement: Bidders must submit proposals setting out how their proposals will enhance and contribute to the Board's vision. Bidders should explain their role in delivering the Board's vision, and include proposed performance management mechanisms for demonstrating Project Co's contribution to the achievement of this vision.
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will contribute to the Board's vision.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
				5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements NOT SCORED AT DRAFT FINAL TENDER
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.

10

The Bidder's approach:
• demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or
• proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

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Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B3. Clarity, robustness and quality of understanding of Project outcomes and approach to contribution of delivering these
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.57
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B3.1

Submission Requirement
 Bidders must submit proposal setting out their understanding of the Project outcomes (as outlined in the Boards benefits realisation plan) and how their proposals will contribute to the delivery of outcomes/benefits with specific details of how the Bidder has already addressed these in their Final Tender submission, or how they will be addressed after Final Tender submission. Bidders must also outline what they offer by way of skills and/or innovative solutions to deliver these outcomes/benefits.

Pass / Fail Guidance
 To Pass, Bidders will be required to demonstrate that they understand the Project outcomes and will contribute to these.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary	Overall Comment	Score	Scoring Guidance
			5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		NOT SCORED AT DRAFT FINAL TENDER	6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
			8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.

		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.
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Status		
Review Stage	Reviewer	Date

ITPD Evaluation Proforma

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B4. Clarity, robustness and quality, of approach to partnership and collaborative working with the Board and its partners
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.81
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B4.1

Bidders must submit a method statement outlining their approach to collaborative working and developing and maintaining a successful long term partnership with the Board and its partners, (i) in the period from Preferred Bidder appointment to Financial Close; (ii) throughout the construction period; and (iii) operational period of the contract confirming in their proposals:

- Submission Requirement
- What they believe to be the factors critical to achieving a successful relationship (both short term and long term);
 - Their understanding of the key interface issues and how they intend to manage these and integrate with the existing relationships;
 - How they will develop and maintain a full understanding of the Boards' objectives including matters identified during Dialogue;
 - How their objectives can reflect and adapt to the Board's goals as they evolve over time; and
 - The manner in which they will conduct themselves that accords with the culture of the Board, local communities and other key stakeholders to the Project.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to collaborative working.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Score	Scoring Guidance
Overall Comment			5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.

Final

	NOT SCORED AT DRAFT FINAL TENDER	6-7	The Bidder's approach: <ul style="list-style-type: none"> • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9	The Bidder's approach: <ul style="list-style-type: none"> • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10	The Bidder's approach: <ul style="list-style-type: none"> • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B5. Clarity, robustness and quality of approach to staff development including recruitment, training, induction and HR issues
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.32
 Pre-Score Pass/Fail Outcome
 Submission Ref: B5.1

The Bidders must submit proposals setting out details of the following:
 • Approach to recruitment and vetting of staff, including as appropriate relevant security clearances (e.g. Disclosure Scotland, Protection of Vulnerable Groups Scheme etc);
 • Procedures for working in areas with children or vulnerable persons; and
 • Details of its employment policy and evidence that employees and prospective employees are treated fairly irrespective of race, gender, religion, disability or background.

Submission Ref: B5.2
 B5.2 Human Resources Issues
 The Bidders must submit proposals setting out:
 • Details of their Occupational Health approach for staff having come into contact with high risk person or areas.

Submission Ref: B5.3
 B5.3 Training and Induction
 The Bidders must submit proposals setting out:
 • Details of any achievement in relation to the Investors In People initiative (or equivalent);
 • Details of the Bidder's employee development and appraisal system;
 • Details of its own and its supply chain's training policy and procedures, including an indication of the training to be offered to the on-site staff specific to this Contract and a statement of the percentage of their annual turnover which is spent on staff training;
 • Details of induction programme and ongoing training for staff, specifically working with HV systems and Legionella control; and
 • Details of induction programme for sub-contractors.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to staff development.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

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Appendix E

Bidder:

Category: Quality Evaluation Criteria

Sub Category: B: Strategic and Management Approach (5%)

Submission Requirement Reference: B6. Clarity, robustness and quality of approach to delivering community benefits

Quality Evaluation Basis: Scored

Quality Evaluation Criteria Weighting: 0.32

Pre-Score Pass/Fail Outcome:

Submission Ref: B6.1

Submission Requirement: Bidders must submit their proposals to deliver community benefits as part of the Project in accordance with Clause 73 (Community Benefits) of the NPD Project Agreement and Appendix I of Volume 1 of the ITPD. These should include specific proposals covering economic, environmental and social benefits related to the Project during both the construction and operational stages of the Project.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to community benefits (including complying with the minimum targeted recruitment numbers set out in Appendix I Section 2.1).

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: * demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or * proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: * demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or * proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: * demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or * proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B7. Clarity, robustness and quality of approach to integration of design with facilities management considerations
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.32
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B7.1

Bidders must submit proposals demonstrating how a consistent and a coordinated approach will be developed and assured between the building design and FM solutions. Bidders shall take account of the hard FM site interface issues and integration with the soft FM which will be provided by the Board. Bidders responses shall include specific proposals on:

- Submission Requirement
- How their design development process will consider and incorporate the FM aspects at each stage of the process from pre financial close through to construction; and
 - The method by which design coordination issues will be managed and FM interface issues raised with the Board and its partners.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to integration of design with facilities management.

Lead Reviewer(s):

Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B8. Clarity, robustness and quality of approach to consortia management arrangements including approach to sub contractors
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.57
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B8.1

Bidders must submit proposals setting out details of how its consortium will be managed, setting out the key roles and their responsibilities including technical roles within their consortium they have identified as key to the Project during contract finalisation, construction and operational stages and Project Co's role in leading the project management. This shall include team leaders for all principal disciplines, both before and after financial close, and may include but not be limited to the following:

- Submission Requirement
- Project and programme management;
 - Risk management;
 - Design;
 - Works;
 - Services; and
 - Quality, safety and environmental management including HAISCRIBE and BREEAM.

Submission Ref: B8.2

Where any element of the Works and/or Services are to be provided by subcontractors other than the Contractor or Service Provider(s) Bidders must submit details of:

- Submission Requirement
- The selection process undertaken for such sub contractors that are confirmed at the time of submitting Final Tender, and/or the selection process (including timescales) that will be undertaken for those subcontractors yet to be confirmed; and
 - The manner in which performance of the sub contractors will be secured and integrated within the overall performance requirements of the Board's output specifications.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to consortia management proposals.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary

Overall Comment	Score	Scoring Guidance
	5	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
	6-7	The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
	8-9	The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
	10	The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.
	NOT SCORED AT DRAFT FINAL TENDER	

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B9. Quality of proposed personnel
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.32
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B9.1
 Submission Requirement: Bidders must submit a summary curriculum vitae (maximum of two pages per person) of the personnel proposed for the roles identified in B8 above which shall include (as a minimum) details of key experience, education and professional status.
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that their key personnel have satisfactory levels of experience.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B10. Clarity, robustness and quality of approach to continuity throughout the Project
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.32
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B10.1
 Bidders must submit proposals setting out their continuity plan for all stages of the project. The key matters to be addressed will include:
 • how any changes in personnel between their pre and post financial close teams will be managed and communicated;
 • describe how as part of the design development process they view Project Co's role in ensuring design continuity and knowledge transfer. This will include how they will achieve design team continuity throughout the whole design development, construction and operational phases considering the consortium team and design organisations, and the key personnel working within each of those organisations. The continuity plan shall address proposals for the role of design staff on-site during the development and the Works phase; and
 • the submission should particularly address the issue of consistency of personnel throughout the project and the need for procedures to deal with knowledge transfer to ensure smooth transition when required.
 Submission Requirement
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that there will be continuity throughout the Project.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		Overall Comment	Score	Scoring Guidance
			NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
				6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
				8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
				10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B11. Acceptable organisational diagrams for each stage of Project
 Quality Evaluation Basis: Pass/Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: B11.1
 Bidders must submit organisation diagrams for the consortium including the lines of communication with the Board and other key stakeholders for each of the phases of the project including:
 Submission Requirement:
 • contract finalisation (appointment of Preferred Bidder to Financial Close);
 • construction and commissioning period; and
 • operational term.
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate a clear organisational structure for each stage of the Project.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B12. Clarity, robustness and quality of approach to health and safety
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.81
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B12.1

Bidders must submit a detailed health and safety strategy which the Bidder proposes to adopt to comply with in fulfilling their health and safety obligations throughout the project, covering the following phases:

- contract finalisation (appointment of Preferred Bidder to Financial Close);
- construction and commissioning period; and
- operational term.

In particular, the proposals should address Project Co's leadership role and key project roles throughout and particularly in the delivery and management of the Project on a 24/7 operational site, addressing key issues such as:

- The Boards requirements;
- Operational continuity requirements of the RIE Facilities;
- Obligations to connect to and maintain critical service connections;
- Traffic management – construction and operational access/ egress;
- Compliance with HaiScribe requirements;
- Construction activity;
- Linking to a live operational major health facility;
- Proximity to live operational general hospital facility (24/7) and medical school;
- Security issues;
- Access and maintenance requirements of the project;
- Pollution control;
- Noise, dust, water egress, and vibration issues and the like; and
- Details of business continuity plans.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate they will adopt a robust approach to health and safety.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B13. Acceptable approach to environmental, quality and health and safety management systems
 Quality Evaluation Basis: Pass/Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: B13.1

Submission Requirement: Bidders must submit proposals setting out how Project Co intends to set up, manage, maintain, work towards and gain accreditation of its environmental, health and safety and quality management systems including specific proposals on:
 • The systems to be developed and implemented;
 • How these systems will be put in place;
 • The process for the development of the systems;
 • Interim measures while the systems are being developed; and
 • Timescales for accreditation.

Submission Ref: B13.2
 Submission Requirement: As a minimum Bidders must submit proposals setting out the following aspects of their environmental, health and safety and quality management systems:
 • Proposed document management systems;
 • Verification procedures for design work;
 • Detailed change control procedures for each stage of the Project;
 • Procedures and a programme for carrying out Project reviews; and
 • Description of the procedures to co-ordinate and manage the design process including the interface between design teams and continuity of design team members (as set out in B10). In addition, a statement of how and when design changes will be reviewed and commented on by Project Co/ Service Provider.

Submission Ref: B13.3
 Submission Requirement: Bidders must submit proposals demonstrating that they operate an accredited Health and Safety management system complying with the OHAS 18001 standard.
 Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt an acceptable approach to management systems.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B14. Clarity, robustness and quality of approach to management of design development including integration with the Board and its partners
 Quality Evaluation Basis: Scored
 Quality Evaluation Criteria Weighting: 0.16
 Pre-Score Pass/Fail Outcome:
 Submission Ref: B14.1

Submission Requirement: Bidders must submit proposals setting out :
 • Their approach to managing the Project's design development, with particular emphasis on development post Final Tender, including proposals for interface with specific sub-groups harmonising with the current Board Project structure. The submission should include a description of the procedures to co-ordinate and manage the design process and to interface with key stakeholders, including document management, verification of design, change control during design development and design reviews; and
 • The management and review structures and procedures that will be put in place by the Bidder to manage potential conflicts, delays, changes in the Board's goals and other issues at each key design stage of the Project.

Pass / Fail Guidance: To Pass, Bidders will be required to demonstrate that they will adopt a robust approach to management of design development including a commitment to working with the Board.

Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
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Appendix E

Bidder:

Category: Quality Evaluation Criteria
 Sub Category: B: Strategic and Management Approach (5%)
 Submission Requirement Reference: B15. Acceptable programme from appointment as Preferred Bidder to Financial Close
 Quality Evaluation Basis: Pass/Fail
 Quality Evaluation Criteria Weighting: n/a
 Submission Ref: B15.1
 Bidders must submit a week by week programme covering the contract finalisation period from appointment of Preferred Bidder until Financial Close with a detailed breakdown of the key tasks to be completed by the end of each week with the critical path and key milestones shown. Bidders shall supplement the programme with commentary on, as a minimum, the following matters:
 • Mechanisms that will be adopted to ensure that the critical path for the technical, legal and commercial activities will remain on programme, and therefore that the overall Project programme is maintained;
 • Confirmation of key inputs, timescales and required by dates for the Board to review/approve Bidder submissions during contract finalisation;
 • Confirmation that their overall programme to Financial Close, is achievable; and
 • Key risks to the Project proceeding on programme shall also be identified, with a brief commentary on how the Bidder proposes to mitigate each risk.
 Submission Requirement
 Pass / Fail Guidance: To Pass, Bidders will be required to submit a logical and deliverable programme.
 Lead Reviewer(s):
 Support Reviewer(s):

ITPD Response	
Check Point	Reviewer's Comment
Scope and Level of Detail Description of scope and level of detail provided in proposal	
Strong Elements of the Submission What aspects are particularly good and/or innovative? Do the proposals demonstrate quality and provide added value? Are the proposals robust and flexible for future change? If relevant, do the proposals comply with the	
Weak Elements of the Submission and Areas of Concern List any key issues or areas of concern, including non-compliance with Trust requirements, departures from good industry practice and any noted qualifications.	
Others to Consider Highlight here any particular aspects that other reviewers should be aware of and/or should consider further.	
Additional Information List here any additional information/clarifications to be sought.	

Summary		
Overall Comment	Score	Scoring Guidance
	NOT SCORED AT DRAFT FINAL TENDER	5 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs satisfactorily in complying with the Board's requirements.
		6-7 The Bidder's approach: • demonstrates a satisfactory understanding of all aspects of the Board's requirements and a detailed and good understanding of some aspects of the Board's requirements; and/or • proposes a solution which performs well against the Board's requirements
		8-9 The Bidder's approach: • demonstrates a detailed and very good understanding of all aspects of the Board's requirements; and/or • proposes a solution which, performs very well against the Board's requirements.
		10 The Bidder's approach: • demonstrates an exceptional understanding of all aspects of the Board's requirements; and/or • proposes a solution which performs very well in complying with the Board's requirements and excels in complying with some of the Board's requirements.

Status		
Review Stage	Reviewer	Date

Re-provision of RHSC and DCN at Little France
Confidentiality Undertaking and No Conflict
Declaration in relation to both Dialogue and evaluation
of Final Tenders for the Project

I, **[insert name of Individual], [Insert designation], [company]**, being involved in the (a) Dialogue for the Project; and/or (b) evaluation of the Final Tenders for the Project, and (where relevant) having read the **relevant evaluation provisions within the Invitation to Participate in Dialogue**, hereby:

- (i) undertake not to disclose or share with any party (other than those professional advisers instructed by Lothian Health Board and/or any Lothian Health Board parties, each of whom are directly involved in the Dialogue for the Project and/or the evaluation of the Final Tenders for the Project) information relating to the Project, including information relating to the Dialogue, the Final Tender process and/or to evaluation of the Final Tenders;
- (ii) confirm that I have no conflict, including any awareness of any potential conflict of interest, being involved in the (a) Dialogue for the Project; and/or (b) evaluation of the Final Tenders for the Project, of economic operators for the Project.

The foregoing confidentiality undertaking at (i) above does not apply to any information to the extent that: (a) it is already in the public domain as at the date this document is signed or it subsequently comes into the public domain other than by breach of the foregoing confidentiality undertaking; (b) it was demonstrably already known to the party giving the undertaking prior to its involvement with the Project; or (c) it must be disclosed pursuant to a legal or regulatory obligation placed upon the party giving this undertaking.

All defined terms shall have the meaning given to them in paragraph 1.3.2 of the Invitation to Participate in Dialogue for the Project.

Signed

Dated

Appendix H - Protocol for Storage and Management of Files Draft Final Tender and Final Tender submission documents

Conject

30 September – remove access to Bidder submission areas for all except

NHSL - *Sorrel Cosens, Lauren Lynch, Ashley Riley*

Technical Adviser – *Maureen Brown, Scott Abercrombie, Kamil Kolodziejczyk*

Financial Adviser – *Michael Pryor, Lindsey Crawford, Lucy McArthur*

Legal Adviser – *Andy Orr, Lynn Pentland*

Cost Adviser – *Rod Shaw*

Bidders will upload their submissions into the relevant folders for Draft Final Tender and Final Tender on Conject.

Quality evaluation submissions:

- Technical submission part A – executive summary (excluding the overview of the Draft and Final Tender from a financial perspective)
- Technical submission part B – strategic and management: separate folders for each of 15 criteria with supporting appendices
- Technical submission part C – design and construction: separate folders for each of 30 criteria with supporting appendices – excluding C29
- Technical submission part D – facilities management: separate folders for each of 14 criteria and any supporting appendices – excluding D13
- Technical submission appendix 1.1 – design deliverables
- Technical submission appendix 1.2 – specifications
- Appendix C (iv) Interface Proposals

Commercial submissions:

- Executive Summary (including the overview of the Draft and Final Tender from a financial perspective, including a summary of capital costs, the Unitary Payment and funding structures)
- Technical submissions – costs criteria files for C29 & D13 and appendices
- Financial Submission
- Legal submission

Hard copies

Bidders will each provide two hard copies of their submissions broken down into the following volumes.

Quality evaluation volumes:

- Technical submission part A – executive summary (not to include any cost info)
- Technical submission part B – strategic and management
- Technical submission part C – design and construction (except C29)
- Technical submission part D – facilities management (except D13)
- Technical submission appendix 1.1 – design deliverables
- Technical submission appendix 1.2 – specifications

Commercial volumes:

- Technical submissions – costs criteria C29 & D13
- Financial Submission
- Legal submission

These will be received and signed for by Sorrel Cosens & Lauren Lynch and stored securely in the Project Offices.

It is imperative that the commercial volumes are not accessed by evaluation team members undertaking quality evaluation. These will be secured separately and access managed by Sorrel Cosens & Lauren Lynch.

NHSL shared drive

A new secure folder will be set up for Draft Final Tender and Final Tender submissions.

The filing structure for each Bidder will reflect the files on Conject. Only those listed in the evaluation manual as being in an evaluation group for one or more of the *quality* evaluation criteria will have access to the following sub-folders.

Group	Members
Technical submission part B – strategic and management	Brian Currie (Project Director) Iain Graham (Commercial and Legal) Jackie Sansbury (Operations and Commissioning) Janice Mackenzie (Clinical and Service Users) Ruth Kelly (Associate Director of HR) Alex Joyce (Employee Director) Howard Royston (Head of Estates) Eric Drennan (Health and Safety Officer)
Technical submission part C – design and construction (except C29)	Brian Currie Janice MacKenzie Jackie Sansbury Fiona Halcrow (Service Project Manager) Howard Royston Stuart Davidson (Contracts Manager) Ernie Bain (Estates Manager) John Sturgeon (eHealth Head of Programmes and Development) Wayne Clemitson (System Administration Manager) Neil McLennan (Capital Project Manager) James Steers (Clinical Director) Janette Richards (Infection Control) Clive Armstrong (Head of Fire Safety) Douglas Coull (Equipment)
Technical submission part D – facilities management (except D13)	Jackie Sansbury Howard Royston Stuart Davidson Clive Armstrong

Three more secure folders will be set up for only those listed in the evaluation manual as being on the evaluation team for cost or commercial evaluation.

Cost volumes - Technical submissions – costs criteria files for C29 & D13 and appendices	Lynn Allan (Project Accountant)
Financial Submission	Lynn Allan

Legal submission	Iain Graham
------------------	-------------

After the deadline for submissions (12.00 noon on 21 October 2013), Sorrel Cosens, Lauren Lynch and Ashley Riley will commence downloading submissions for each Bidder to the NHSL secure files.

The documents will not be made available to Evaluation Group members until checks have been completed to ensure that all submissions have been downloaded.

Technical Adviser shared drive

Mott MacDonald will set up secure files with restricted access to mirror the Conject and NHSL filing structure and manage access to submission materials in the same way.

Access to submissions for review

All Evaluation Group members named above must sign a Confidentiality Agreement before commencing review of any bid documents.

Hard copy volumes will be available to the evaluation team to sign out for review within the Project Offices. No copies will be allowed off site. Technical advisers wishing to view hard copies of submissions will need to work in the NHSL Project Offices.

Electronic submissions will be available to view on the NHSL system for the named evaluation group members only. These can be viewed from any terminal on the network, but working space will be provided in the Project Offices and evaluation group members are asked to base themselves there whenever possible.

Evaluation group members must not photocopy or print out any submission materials or keep 'personal' copies; requests for additional copies must be referred to Sorrel Cosens and Lauren Lynch to be produced and treated as a controlled document. Computer screens must be locked when evaluation group members are not at their desks.

Recording review of submissions

A template with the details of NHSL's requirements will be available for each technical criteria. This tool will be used by evaluation group members to record their comments and review of submissions.

Evaluation group members must not

- refer to the names of specific organisations on this template (use Bidder A / B / C)
- save personal copies of any evaluation material
- include their name in their evaluation template

The evaluation templates for a criteria will be collected at the close of the meeting to discuss that criteria and secured by the Project Management Team. These will be destroyed on completion and sign-off of the Draft Final Tender Report and Final Tender Report by the Core Evaluation Team.

Adams, Kirsty

From: MrKamilKolodziejczykMottMacDonaldLtd(HeadOfficeUK) <-> on behalf of MrKamilKolodziejczykMottMacDonaldLtd(HeadOfficeUK)
Sent: 07 November 2016 17:47
To: [REDACTED]
Cc: [REDACTED]
Subject: Re: G1547 RDD Review Environmental Matrix

Attributes

Attribute 2 : 33. M&E Building Services

Message

David / Ken / Colin,

The Board have serious concerns over the upgrading Environmental Matrix to Status B considering some of the issues raised (as per MM-GC-002084) being the same as the issues that had been raised since FC. There are also concerns over the potential inaccurate information being transferred to the Room Data Sheets being submitted through RDD.

However, as requested by Project Co, the Board has upgraded the Environmental Matrix to status B, noting the Board still does not believe the Environmental Matrix and resultant design complies with the Project Agreement. Project Co's failure to comply with the BCR's / PCP's (as per MM-GC-002084) the Board believes would result in a non-compliant Facility.

The Board would suggest that Project Co resolves the non-compliant and other issues as a matter of urgency, and requests that Project Co issues a strategy for resolution of these issues.

Regards

Kamil

From: K Kolodziejczyk
Sent: 17/10/2016 11:52:44 AM BST (GMT +01:00)
To: BMEinburgh DocControl, Ken Hall, David Martin
Cc: Didier Blanchet, Richard Hair, Clive Hall, Wallace Weir, Kelly Gordon, Liane Edwards-Scott, Alison Gordon, Douglas McFall, Darren Pike, John Wales, NHSL RHSC + DCN
Mail Number: MM-GC-002084
Subject: Re: G1547 RDD Review Environmental Matrix

The Board have reviewed the Environmental Matrix and still has significant concerns on items that do not appear to comply with the BCR's.

The Board notes the following general comments:

1. The Board has highlighted cells in blue and red bubble on the hard copy which require PCo review.
2. The Environmental Matrix should be updated to reflect the Production Group drawings.
3. Currently the matrix doesn't reflect the clinical lights schedule submitted through Clinical Lights Specification and Clinical Lights Technical Submittal.
4. EM shall be updated to reflect all circulation areas as per SoA.
5. Some lux levels don't appear to align with LG2.
6. Some ventilation rates don't appear to comply with BCRs. The Board would like to point that is still awaiting response from PCo to the issues raised as per MM-RFI-000172 & MM-GC-002006 relating to ventilation rates.

Some specific comments as follows:

1. See example G-D1-015 in the table - confirm filtration to physical measurement rooms.
2. Areas off the circulation area / corridor, i.e. 1-D6-060 Resus Bay, indicates transfer air but not known from where. Same principles applies to all Bays and Receptions.
3. See example 1-D7-005 in the table - indicates area of 4m² however General Arrangement drawing shows 4.8m². Please review this and all other similar instances.
4. See example 3-D9-009 in the table - indicates no cooling and no ventilation but filtration. Please review this and all other similar instances.
5. See example 3-D9-016 in the table - contradiction, please confirm for this and all other similar instances.
6. See example G-F1-037 in the table – only extract and filtration, please confirm for this and all other similar instances.

7. See example 1-H2-013 in the table – confirm temperature and cooling requirements for this and all other similar instances.
8. See example 1-L1-015 in the table – “via bedroom and en-suite” confirm extract rates for bedroom and en-suite.
9. All Dirty Utility rooms – please confirm dirty utility heating type and control.
10. Changing Cubicles – will be supplied with 18 deg C fresh air with no option to increase temperature. Please confirm.
11. Dictation Rooms - will be supplied with 18 deg C fresh air with no option to increase temperature. Please confirm.
12. 1-P1-067 (see table) – please confirm proposal.
13. 1-P1-090 and 1-P1-005 – should this not be other way round? Please confirm.

Whilst the Board has noted general and specific comments above, the Board reminds Project Co that unless the Board has already accepted a derogation, it is Project Co’s obligation to comply with the BCR’s / SHTMS etc, and the Board not commenting, does not remove that obligation on Project Co.

Regards
Kamil

From: B DocControl
Sent: 20/09/2016 1:08:11 PM BST (GMT +01:00)
To: Kelly Gordon, Kamil Kolodziejczyk, NHSL RHSC + DCN
Cc: Didier Blanchet, Richard Hair, Clive Hall, Wallace Weir, Liane Edwards-Scott, Alison Gordon, Ken Hall, Douglas McFall, Darren Pike, John Wales
Mail Number: MPX-TRANSMIT-006178
Subject: Fwd: G1547 RDD Review Environmental Matrix

Please find attached RDD documents issued electronically for information. Documents have now been put into a workflow and a hard copy will be issued for your review.

Should you have any queries please do not hesitate to contact me.

Kind Regards,

Kara

BM Edinburgh Document Control

Multiplex Construction Europe Ltd
RHSC & DCN Site Office
Little France Crescent
EDINBURGH
EH16 4TJ

T:0131-666-5550

From: L Johnston

Sent: 19/09/2016 3:58:48 PM BST (GMT +01:00)

To: Didier Blanchet, Richard Hair, Clive Hall, HLM Document Control, Jo Dorling, Mark Harrison, Lorraine Robertson HLM Architects, Ross Barrett HLM Architects, Eilidh Jane Simpson, Chris Youd, RHSC Document Control, James Ferry, Kieran Furley, Stacey Green, Neil Lancaster, Gavin Marsh, Gerry McDonnell, Jamie McLeish, Alison Mulrine, Gearoid Murray, Declan O'Donovan, Mark Quinn, Sinead Rogan, Brendan Rooney, Bob Violet, Jack Whittam, BMEdinburgh DocControl, Liane Edwards-Scott, Colin Grindlay, Ken Hall, Andy Kerr, Nicholas Leach, Jonathon Mays, Andrew McColl, Keith McIntee, RBG Document Control, Barry McCormack, Ryan Stokes, Lyndsey Johnston, TUV-SUD WHITTLE

Mail Number: WWHIT-TRANSMIT-000794

Subject: G1547 RDD Review Environmental Matrix

Please find attached our updated Environmental Matrix.

Regards

Lyndsey Johnston

Document Controller

TUV SUD Limited

The Venlaw Building

349 Bath Street

Glasgow

G2 4AA

United Kingdom

Tel: +44 (0) 141 221 9866

[Lyndsey.Johnston](mailto:Lyndsey.Johnston@tuv-sud.co.uk) 

www.tuv-sud.co.uk/wallacewhittle



SCOTTISH HOSPITALS INQUIRY
Hearing commencing on 24 April 2023
Bundle 14 - Supplementary