Tender Evaluation Questions, Contract Conditions, Pricing and Process requirements and scoring

Moderated scores following meeting 30th April 2020 : Dave Anderson, Peterborough City Council; Kim Cooke and Heidi Parker Cambridge and Peterborough Combined Authority and Tony Gale, Adam Hope Mace Limited

	Method Statement Questions - these are fixed for the duration of the process	Weightings	Post Negotiation score	Comments for feedback
1	**Project Delivery - MASTER PROGRAMME for the Delivery of the New University.** **Your are required to provide a comprehensive Gantt Chart that covers ALL the headings and activities below.** Please structure the Gantt chart by each of the question headings below and ensure that all of the activities that demonstrate how you will achieve each requirement are clearly listed. This needs to include timescales and the critical path. The evaluation of this question will be as part of the evaluation of each of the specific questions.	PASS/ FAIL	Pass	Final Tender received on the 21st April 2020 met the required standards as detailed in the Heads of Terms following negotiation HOT reference: Section 5 5.1.1 capable of achieving degree awarding powers / university title within a period of 10 years from opening in Academic Year 2022/23; Achieved by 2032 within ten years (see milestone programme line 58) 5.1.2 is eligible to apply to OfS for full taught Degree Awarding Powers (as defined in the Regulatory Framework) by the beginning of the academic year 2028/29; Achieved OFS application 2025 (see milestone programme 34) obtained by 2028 (see milestone programme line 39) 5.1.3 is eligible to apply to OfS for university title (as the "University of Peterborough") in accordance with the Framework by the beginning of the academic year 2031/32; Achieved OFS application 2025 (see milestone programme 34)
2	**Formal Commitment to the Project Aspirations, development & Delivery of the New University.** **Your statement of support of the project commitments needs to address ALL of the following** 2.1 Your commitment to the principle of achieving an independent University in Peterborough (5-10 years from inception) - HOW, METHOD and by WHEN 2.2 Your Commitment to cooperate fully with an independent review aimed at establishing the readiness of UoP to achieve University Title - HOW, WHAT PATH and by WHEN 2.3 Your Commitment to supporting the Regional education and development needs - How and by WHEN In support of the above statements, please provide 2.4 A roadmap of the processes, decisions, timescales, maturity levels and other stages required to achieve Independence 2.5 The transition and handover arrangements you would expect at the point of independence. Please ensure these activities and timescales are included in the Gantt Chart required at question 1	10%	4	Opening date in line with requirements outlined in the heads of terms following negotiation – steady state achieved + one academic year from original tender Variance (page 2) in Final tender allowing 4 rather than 7 cohorts of students to progress through the University – could be seen as a positive in terms of stronger reputation and track record and contribution to local economy as noted to drive up demand. Formal commitment provided met the required standards detailed in the final specification following negotiation

3	**Please detail how you will work with the CPCA & PCC to develop an appropriate governance and reporting structure**
	
	Your response needs to detail each of the following requirements
	3.1 The proposed development team and the experience they bring to the project (please include them on the organogram required below)
	3.2 The process by which the governance structure will be identified and agreed
	3.3 Your Proposed constitution of key bodies and how the governance process will flow for decision making purposes.
	    3.3.1 Your proposed governance arrangements for the Development Phase of the New University through to at least 2022.
	    3.3.2 Your proposed governance arrangements to prefigure the future operating practices of the New University from 2022.
	
	Please ensure these activities and timescales are included in the Gantt Chart required at question 1
		20%	4	Legal agreement and governance to be determined in next phase up to July to accord with parties respective Boards including ADP setting up company limited by guarantee. Steering Group to be set up after Award.
				
				Final tender from the ADP dated 21st April 2020 meets the required standards detailed in the specification (inclusive of those standards outlined in the Heads of Terms) following negotiation

4	**Commitment to Primary Objectives: Scale, Scope, Reach, Focus ["Blue Ocean" Strategy]** The New University is seeking to address the needs of a recognised HE cold spot and as such is NOT attempting to compete for existing students with existing providers. The Shadow Curriculum Model provided sets out to address the identified needs of the City and Region which include those of Large Corporates and other local businesses. **Your are required to respond to this question for each of the THREE "SHADOW FACULTIES"/ MARKET ELEMENTS), and address each of the requirements below** 4.1. A summary of the specific market needs (using the previous work done and your own HE knowledge); 4.2. details of how the market needs can be supported 4.3. Student forecasts and mix 4.4. An analysis of space implications and how that support the project aspirations and constraints 4.5. how you will develop appropriate strategies to widen participation and to engage with the needs of the City and Region; 4.6. how you will develop relationships with businesses and integrate business perspectives into course design to leverage benefits for employers and to attract their employees as prospective students; 4.7. details of previous lessons learned and how you will transpose this into benefits to be delivered. Your response should also include: 4.8. A suggested structure for the Shared Strategic Plan for the New University (to be developed in conjunction with CPCA) and the process by which the Plan would be developed and agreed 4.9. A methodology to achieve TEF Gold standard at the earliest opportunity. Please ensure the critical activities for EACH FACILITY and the STRATEGIC PLAN and TEF Gold achievement are included within your Master Programme	20%	3	Final Heads of terms published for response in Final tender by ADP confirmed the following updated numbers as agreed following negotiation : 2022 2042 ITN 1 - 2000 Min HOT final tender (2000) actual in finance model 2024/25 ITN 1 5610 - 3000 min in HOT – 3905 actual finance model 2025/26 ITN 1 6736 - 4000 min in HOT - 4357 actual finance model With and Aspiration of 2030/31 12500 (12,500) current financial model is 6363 in total The reduction in Student numbers and economic outcomes adjusted to reflect the addition of a fourth faculty will need to be assessed in development of the FBC This section in overall terms is adequate in addressing the critical / essential requirements agreed following negotiation but it is recognised that there is a significant shift in numbers on campus as a result of additional faculty and shift of reduction in staff numbers and increase of student numbers along with the additional fourth faculty; and in overall terms a significant reduction up to 2030/31 that has been agreed following negotiation. It is also noted that numbers are based on Head Count (HC) not full time equivalent (FTE) as in Shadow Curriculum model.
5	**Staff Recruitment** As part of achieving independence the university requires its own staff and organisation structure and a strategy for building a suitable staff base with the necessary capabilities to make the institution a success. **Your response should include:** 5.1. A proposed Organisational Organogram - your response should address the academic, professional services and para-academic roles within the workforce and the Development team 5.2 A detailed description of each of the key roles and associated responsibilities for the Academic and Senior staff roles, please also state the minimum expected levels of experience and associated qualifications requirements 5.3 A an explanation of your recruitment strategy in terms of attracting staff to the New University along with your policy position in respect of academic credentials (PhDs), teaching qualifications of staff and continuous professional development opportunities. 5.4 If utilising/ seconding existing staff to facilitate the mobilisation of the organisation, please clearly identify these on the organogram, the timescales for which you anticipate the secondment is required for and the process, for how you will identify and recruit suitable persons for each of the roles 5.5 Please provide a resource profile from award through to the end of 2028 accompanied by a commentary an the resource profile. Your commentary should address the risks arising from recruiting staff not already available to you. Please ensure the critical activities under this section are included within your Master Programme	10%	4	Note that in regard to PHD 'Our academic staff will not be required to hold a PhD on appointment (see above for essential qualifications and experience criteria). However, we will actively support these staff to undertake Continuous Professional Development opportunities which will include...' ADP location of staff mobilised will be important and understanding and ensure their commitment to NUoP.

#	Requirement	Weight	Score	Assessment
6	**Curriculum Design and Development** Please explain your methodology and timescales for developing the following curriculum requirements **Your response needs to address each of the following considerations** 6.1 A list of prospective courses 6.2 A summary of you proposed learning and teaching strategies 6.3 How you propose to resource curriculum development before the university opens; including staffing requirements pre 2022 6.4 Details of the development work required to achieve a viable portfolio of courses to be available when the University is scheduled to open in September 2022 6.3 Targeted employability and graduate attributes, 6.4 A summary of proposed course documentation and prospectus content. Your response should take account of the Initial IT Strategy for the New University and the Proposed Procurement Mechanisms for Infrastructure, Hardware and Software. Please ensure the critical activities under this section are included within your Master Programme	10%	5	Proposal meets the required standards requested. A breadth of courses offered also lends itself to curriculum interdependencies through flexible scheduling and study.
7	**Student recruitment, marketing and admissions processes and systems** Please supply a marketing and admissions plan for the first intake to the New University. **Your plan should:** 7.1. Take account of the lead-times for course development and the expectation that local recruitment may need to take place initially outside the UCAS cycle; 7.2. Address the availability of marketing information and should explain how awareness of the New University will be raised, how market segments will be approached and how brand equity will be established from an early stage; 7.3. Include details of how budgets will be deployed and admissions processes established to align students' needs with the curriculum offer; 7.4. Include a marketing and admissions strategy for subsequent years noting any differences in approach as the University develops and brand equity begins to build. Your response should take account of the Initial IT Strategy for the New University and the Proposed Procurement Mechanisms for Infrastructure, Hardware and Software. Please ensure the critical activities under this section are included within your Master Programme	10%	4	note the communication of Brand important given the expectation that it wil use the ADP brand initially. Joint Comms Plan will be crucial to delivering the message that new university of peterborough will work with the CPCA and PCC to deliver the new University in Peterborough.
8	**Student and Academic Services and Systems Development** Please supply an outline operating plan for the establishment of all services and systems which will be required by the New University. **The operating plan should:** 8.1. consider service design and orientation issues; 8.2. consider the needs of students and staff learning/working both on- and off-campus; 8.3. consider staffing levels for the Service(s); 8.4. consider technological infrastructure. If your organisation proposes to use established systems to support the New University on a remote basis, your submission should also: 8.5. confirm that arrangements can be made to port/migrate all data, processes and related capabilities to the New University at the point it will achieve independence; 8.6. explain, where remote mechanisms are to be employed, how service levels to UoP students and staff will be provided and regulated. Your response should take account of the Initial IT Strategy for the New University and the Proposed Procurement Mechanisms for Infrastructure, Hardware and Software. Please ensure the critical activities under this section are included within your Master Programme.	10%	4	Care will need to be taken by ADP I ensuring those off campus resource are adequately allocated to ADP _P and that student satisfaction not diluted or staff don't feel affiliated to ADP- P The final tender received on the 21st April 2020 noted 'We have modelled a number of staffing plans based on the anticipated opening hours of the building, we would envisage having 8.81 FTE staff for phase 1' which is significantly less than the Shadow curriculum model as a result of off campus back of house staff which will reduce local economic benefit in this regard
9	**Library and learning resources services/systems** The new university will require library and learning resources services and an operational strategy and plan **You are required to provide an outline Strategy and Plan that addresses all of the following** 9.1. Student and Staff requirements 9.2. Information Access including licensing requirements and physical/ electronic access 9.3. staffing levels for the Service(s); 9.4. technological infrastructure. **If your organisation proposes to use established systems to support the New University on a remote basis, your submission should also:** 9.5. confirm that arrangements can be made to port/migrate all data, processes and related capabilities to the New University at the point it will achieve independence; 9.6. explain, where remote mechanisms are to be employed, how service levels to UoP students and staff will be provided and regulated; 9.7. explain, where you would recommend a "digital first/digital only" strategy, the mechanisms by which students and staff would be inducted into the use of library systems and resources; 9.8. include details of likely per capita budget levels and the extent of initial investment in materials to create a baseline library resource. Your response should take account of the Initial IT Strategy for the New University and the Proposed Procurement Mechanisms for Infrastructure, Hardware and Software. Please ensure the critical activities under this section are included within your Master Programme	10%	4	Proposal meets the required standards requested
10	*Strategic Planning, Financial Management and Governance Support Services and Systems Development* *Please respond to the following requirements* 10.1 Please explain how you would establish and develop the strategic planning, financial management and governance support systems to enable the University to thrive and in particular to achieve increasing independence from your organisation. 10.2 Please provide a transition plan to show how your initial role in facilitating the development of the University will give way to a growing level of local management on the road to independence. 10.3 Please provide details of the on-going relationship you would anticipate once independence has been achieved e.g. shared research strategies, shared services, collaborative approaches. Please ensure the critical activities under this section are included within your Master Programme Your response should take account of the Initial IT Strategy for the New University and the Proposed Procurement Mechanisms for Infrastructure, Hardware and Software.	PASS/ FAIL	Pass	The changes made are in line with that agreed during negotiation, outlined in the final agreed heads of terms HOT agreed acknowledge the risk of COVID 19 and the flexibility in relationship between parties It is also noted that the model excludes costs for independence and provides date on which a decision will need to be made to meet Independence within the 10 year time frame.
11	*Legal Structure* *Please advise whether you see this as a Service Contract or a Joint Venture* *If a Service Contract - Please provide a mark up of the attached Heads of Terms along with a supporting narrative for each amendment so as to explain the reason for the change* *If a Joint Venture - Please both mark up the Heads of Terms as above and also detail what financial input you are proposing to make into the JV and how you propose the structure of the responsibilities and benefits under the structure to be distributed and how this links with the delivery of the agreed services*	PASS/ FAIL	Pass	Email confirmation received from Pinsent Masons 30-04-2020 that the Heads of Terms provided in ADP tender dated 21st April 2020 were in line with what was agreed during negotiation.
12a	Please Complete the attached Pricing Schedule ensuring that all elements are priced and reflective of the specification	PASS/ FAIL	Pass	The Financial model notes an initial short fall of £5.4M which will be paid for by ADP loan [As agreed in the HOT the LGF Grant will not be paid back by ADP and is therefore excluded from the finance model and is for CPCA to payback] Break Even point identified 2023/4 noting a negliable surplus decalred afterbreak even shown by ADP which will need to be explored further in the FBC Independence - cost to get to independence excluded and in the order of £8-10M which would be required and decision made 2028 Capital cost toward increased building sixe to accommodate additional faculty and increase student number not within financial model but covered in heads of terms agreed following negotiation - which requires contribution to the capital cost by ADP.

12b	Commentary on the pricing model - please provide a breakdown of any cumulative or aggregated prices that are included in the matrix so as to ensure that they are reflective of the specification and are sufficient for the quality of support being offered.	*PASS/ FAIL*	Pass	Pass; in line with financial requirements outlined in Heads of terms