INVITATION TO TENDER
FOR
ARCHITECTURAL & ENGINEERING SERVICES
FOR NEW HIGH SCHOOLS

TENDER (T06/010)
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Appendices to Tender Evaluation Process

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</table>
1.1 Definitions

a) The Ministry of Education, Training, Youth, Sports & Culture will be hereinafter called the “Client”.

b) Engineering Services will include all the necessary services to design a school and will include but not be limited to Mechanical, Electrical, Structural, Interior Design, landscape, kitchen and a commission agent.

c) Mechanical Engineering services will include all systems associated with underground services. Plumbing, fire protection, air conditioning, ventilation and associated controls.

d) The Architect, including any partner and the accompanying Engineering firms (Mechanical, Electrical, Structural and Interior Design and Commissioning agent) providing the Architectural and Engineering services will hereinafter be referred to as “the Consultant”.

e) The Project Manager will be defined as the Client’s representative. The Project Manager will be the Client’s main contact for all project related concerns through the stages of both design and construction. All meetings of design involving Ministry staff and/or other external stakeholders will be coordinated by or in consultation with the Project Manager.

1.2 Introduction

On behalf of the Cayman Islands Government (CIG), the Ministry of Education, Training, Youth, Sports & Culture (the “Client”) intends to proceed with the design and construction of three new high schools, all to be located on Crown land in the districts of North Side, West Bay and George Town. Each is to be capable of accommodating between 500 and 1000 students. It is essential that the schools be completed and ready for occupancy prior to August of 2009. On completion, the schools will be handed over to the Cayman Islands Education Department, who will be responsible for the schools’ operation and maintenance.

1.3 Design Philosophy

The underlying theme of the high schools is envisaged as “educational change within 21st Century learning facilities”. A more detailed design philosophy document together with concept drawings is provided in the attached appendices A1, A2 & A3. The Consultant is required to peruse these appendices. The Client requires that the schools be designed in an inspirational manner. This non-traditional design will both encourage and provide for transformational changes in education. The Client desires innovative designs that promote and recognize the creativity of the student while moving away from the “old” 20th century concept of school buildings. To achieve this transformation design strategy must incorporate:

- Smaller learning clusters of (max) 250 students, so as to encourage greater intimacy within the learning environment;
Spaces that reduce the movement of students and provide an environment for greater pastoral and learning opportunities;

A design that provides for greater visibility, security and safe keeping;

A design that promotes an atmosphere of community;

A classroom design that supports project based learning rather than discipline based learning;

A design that supports and enhances the role of performance in the classroom;

ICT systems which are invisible, appropriate, integrated and interactive;

Utilization of the school for all stakeholders (students, staff and community) both during and after normal school hours;

Universal accessibility recognizing the needs and challenges of all users;

Learning environments that encourage and permit flexibility;

The school must be designed in a manner that will encourage the student to be an enthusiastic learner.

1.4 Project Briefs

A project brief is provided for each of the new schools in the attached appendices A4, A5 and A6. As a general overview each new school will comprise the following key elements:

- Accommodation for an occupancy of between 500 and 1000 students, depending on geographic location, plus approximately 100 staff;
- Covered area in the range of 120,000 to 160,000 square feet (dependent on location and occupancy);
- Home bases or clusters that are designed to accommodate 250 students;
- Shared centralized facilities that include, for example, gymnasium, cafeteria, and resource and technology centers;
- External works that include playing fields, pool, and hard courts, fencing, vehicle parking, and vehicle access roads;
- Ancillary works including a sewage treatment facility and a storm/surface water management plan;
- Maximizing energy efficiency and sustainability within the design to a LEED-NC\(^1\) rating or equivalency;
- A hurricane shelter built to a category 5 hurricane standard for 4,000 persons;
- The project is to include the supply and installation of furniture, fittings and equipment (FF&E), which the Client may wish to procure separately;
- The project is to include the supply and installation of data communications wiring and infrastructure. The provision of hardware/software is to be supplied and installed by the Client.

In summary all three school projects will incorporate identical designs for the centralized shared facilities and the learning centers. The fundamental differences between the three schools will be their unique site layouts and number of learning centers.

1.5 **Project Budget**

The Client has engaged a Quantity Surveyor (QS) to advise on budget and to estimate cost at periodic intervals. A more detailed and accurate cost schedule will be established by the QS as the Consultant develops the design and drawings.

1.6 **Design Programme**

The following schedule is provided only as a guideline for the Consultant’s submission. It is fully expected that the schedule for each of the schools may vary depending on design and construction issues. All schools are to be ready for occupancy prior to August 2009.

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Time lines</th>
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</thead>
<tbody>
<tr>
<td>Advertise for Architects:</td>
<td>August 2006</td>
</tr>
<tr>
<td>Return of Architect Tenders:</td>
<td>September 2006</td>
</tr>
<tr>
<td>Award of Tender for Architect:</td>
<td>October 2006</td>
</tr>
<tr>
<td>Design Completion (include Planning Permission)</td>
<td>August 2007</td>
</tr>
<tr>
<td>Building Control Approval</td>
<td>October 2007</td>
</tr>
<tr>
<td>Tender and Award of General Contractor</td>
<td>November 2007</td>
</tr>
<tr>
<td>Construction completion</td>
<td>May/June 2009</td>
</tr>
<tr>
<td>Commissioning / Fit out</td>
<td>July 2009</td>
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02 TENDER EVALUATION PROCESS

2.1 Definitions

a) **Invitation to Tender**

In the Cayman Islands, the process of public procurement is regulated by Part 9 of the Financial Regulations, 2004. This invitation to tender has been prepared under these regulations.

This Tender is an invitation for Architectural and Engineering service suppliers, through an open and competitive tender process, to bid on the provision of Architectural and Engineering services (A&E).

The requested tender information for each of the options is to include fee proposals, staff hours, project experience, staff names, numbers and qualifications, programme methodology, insurance, and customer references. This information will be reviewed and evaluated to determine which Consultant will provide the best value for services.

b) **Architects**

It is noteworthy to indicate that local Architect representation is deemed essential to the success of the project and may necessitate a joint venture or partnership arrangement. The arrangements of the partnership may be such that the local architect, depending on experience, is deemed the Project Architect and/or the local site representative for liaison and contract administration.

The Consultant shall identify the Project Architect as the person whom the Consultant has tasked with the day to day running of the project, overseeing the design and production of the documentation, coordinating sub Consultants, coordination of project meetings, etc. and overall administration of the contract once the project proceeds to site.

The Design Architect is the person whom the Consultant has engaged to prepare the design and construction drawings and any necessary post construction contract award variations. If a joint venture/partnership arrangement has been entered into, it is envisaged that the Design Architect would be identified as the key person representing the partner firm.

The Director-in-Charge is likely to be the person with whom the Client signs the Consultants contract.
2.2 Architectural and Engineering Services

a) The Client now invites qualified firms with suitable school design experience to tender, on a competitive basis, for Architectural & Engineering (Mechanical, Electrical, and Structural, Interior Design, Commissioning etc) services on the projects mentioned in paragraph 1.4.

b) The project will be tendered in a manner that permits the Client to initially award one school and then to subsequently determine whether or not the bests interests of the Cayman Islands Government will be served to award additional school designs under a different tendered option.

c) All documents included in and associated with this tender, will form a part of the Consultant's tender.

d) A detailed listing of services to be provided by the Consultant is attached in appendix A13 of the tender agreement. The Client's expectations for commissioning services are provided in appendix A14. A summary of the services that the Consultant will be required to account for in this tender are as follows:

• **Stage 1: Review Phase**
  Review, familiarize and understand the sites and all documents

• **Stage 2: Outline Phase**
  Engage specialist sub Consultants, prepare detailed space requirements and outline drawings

• **Stage 3: Schematic Design Phase**
  Develop outline into schematic design, prepare graphic presentation images or models

• **Stage 4: Detail Design Phase**
  Meet with stakeholders, develop schematic drawings into detail design, and provide appropriate information to QS

• **Stage 5: Contract Document Phase**
  Prepare construction drawings and contract documents
Building Brighter Futures

- **Stage 6: Tendering and Contract Award Phase**
  Assist with tendering, selection and appointment of Contractor

- **Stage 7: Contract Administration Phase**
  Administer the construction contract on site

- **Stage 8: Post Construction Phase**
  Coordinate project completion, commissioning, occupancy, etc.

- **Stage 9: Project Completion**
  Issue completion certificate and assist in agreeing final account

f) Note that the Consultant will be required at various times throughout the above noted project stages to meet with appropriate Government departments and agencies and other Ministry and Community stakeholders to obtain information, approvals, permits and agreements. The Consultant will work closely with the Project Manager in the coordination of the meetings. The Consultant will be responsible for the recording and distribution of minutes for these meetings.

g) Additional information is provided in appendix A12 regarding conditions of appointment

h) A proposed drawing listing that will be expected by the Client in the contract document phase for construction drawings is attached in appendix A15.

2.3 **Evaluation Criteria of the Tender**

Each Tender submission that has met the minimum qualifications as outlined in the advert will be evaluated on the criteria as defined below. A tender checklist is attached as appendix A7 to ensure that each Consultant provides the required information.

The following information is requested from the Consultant. Additional attachments have also been provided with a template format to assist in the preparation of the submission.

a) **Architectural Firm/s:**
Provide a description and background of the firm/organization and directors and senior staff members and their qualifications. If a joint venture/partnership arrangement has been entered into, provide the same information for the partner firm(s). Provide information regarding the firm’s current workload and capacity to handle this project. Identify the director in charge for this particular project.

b) **Sub Consultants Firms:**
Provide a list of the sub-Consultant firms (i.e. Structural, Mechanical, Electrical, Plumbing, Interior Design, Commissioning, other) firms that are to be engaged in the project. Please include a brief description of the each company, stating length of time in business under its current name, parent company ownership (if any), and a list of director, staff size and position types. This information will demonstrate the Architect and his sub-Consultants’ ability to meet the Clients criteria, and to undertake projects of this size and nature.
c) **Project Team Members:**
The Consultant is to prepare and submit project Team vitae which is to include at a minimum the Project Architect, the Design Architect, the mechanical, electrical, structural, interior design Consultant and commissioning. A team organization chart showing the individual names and the reporting structure between the Client and each team member is to be included. A brief biography of each member of the Project team listing experience and qualifications is required in the vitae.

d) **Project Experience:**
The project experience information is to be submitted in two different formats one being the company project experience and the other being the experience of the individual members of the project team (appendixes A8 and A9).

Company Project Questionnaires **appendix A8** is to be completed by the Architect firm/s and each of the sub-Consultant firms (mechanical, electrical structural & interior design) List, briefly, key significant projects completed within last 10 years by each firm, highlighting educational type projects. Note, a detailed company history and/or an exhaustive list of projects the company has completed, is not required. Only projects of a value of US$10 million that have been completed within the last 10 years are necessary, and/or projects held in high public esteem, such as any commendations achieved. The submission will be scored on the basis of breath of experience. This experience may include buildings other than schools. A greater importance will be placed upon educational facilities and more specifically on high schools.

The Client also requires project experience for each of the members of the project team. **Appendix A9** is to be utilized for this purpose and is to include the Project Architect, the Design Architect, Interior Design, Mechanical and Electrical. Only projects of US$5 million or greater that have been completed within the last 10 years are necessary. Educational type projects and more specifically High School experience will be deemed to be of greater importance. The experience of the team member who will be responsible for contract administration experience will also to be considered important criteria in the overall evaluation. The size, number and type of new construction projects managed and administered will be of greater importance.

e) **Conceptualization of the Design Philosophy:**
The understanding of the Clients design philosophy as stated in paragraph 1.3, and the ability of the Consultant to conceptualize this bold vision in a formal way will be significant factor in the evaluation process. The Consultant should demonstrate a thorough understanding and appreciation of the design philosophy in the Project Outline and the documents identified in appendices A1, A2 and A3. Each tender is to include a written essay not to exceed 1000 words with the Consultant’s interpretation of the Client’s design philosophy. The essay is also to enlighten the Client as to why the Consultant’s Team is especially unique and capable of assisting the Client in transformational educational change.

f) **Form of Tender- Signature /Fee Structure/Additional Services :**
The Form of Tender is divided into three parts. Form of Tender Part 1 (**appendix A10-1**) is the signature page. The Form of Tender Part 2 (**appendix A10-2**) is the Consultant’s fee structure and is presented differently for the first school, than for the remaining two schools. It is recognized that the use of repeat designs will save design costs.
and disbursements. The Form of Tender Part 2 (A10-2) is broken out into the various stages from stage 1 to stage 9 and is to include all A&E services with the exception of HVAC commissioning. Commissioning costs are to be identified as a separate line item and are to be based on the information outlined in appendix 14.

Finally the additional services for project staff hours are provided in Form of Tender Part 3 (Appendix A10-3). The Form of Tender Part 3 (Appendix 10-3) identifies hourly rates by quantity and is to be completed for each school in the event that there are requirements for additional services.

The Client may award the tender in stages. Stage 1 will include all necessary A & E services for the first school, while stage 2 will represent the A & E services for the remaining two schools. The award of Stage 2 may occur at a later date and will be largely contingent on the success of Stage 1. The Form of Tender will be a significant factor in the evaluation process and tender award. Submissions are to be made in Cayman dollars. For the purposes of exchange, the Cayman Islands Government uses the exchange rate of 0.8375 to one United States Dollar.

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g) **Programme / Staff Hours & Communications Plan:**

The Consultant is to provide a programme that is to be followed for all three schools. The programme will include a schedule and the manpower resources necessary to design three projects of this complexity and size. The plan should identify stages 1 to stage 9 as outlined in 2.2 (e) in a bar graph display. The work plan should indicate project phase, timelines, resources and hours of each of the key members of the project team. Project team hours are to also be provided in the format identified in appendix A11 for all three schools. The timeframes to design and construct all three schools rather than one school should be reflected in the programme. This plan should also include a communication plan and demonstrate to the Client how stakeholder and community involvement and feedback will be obtained and incorporated into the design. The communications plan should describe how and when the flow of information will occur among all the participants and users in the process. These criteria will form part of the overall assessment.

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h) **Value Added:**

The Consultant is to provide additional information that speaks to why the Consultant’s team is to be considered the best candidate for this proposal. The Client is seeking information that pertains to the Consultants’ ability to bring added value to the project. This may include but is not limited to unique experience and or expertise, special awards, and recognition of innovative designs. This information will be part of the overall assessment.

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i) **Project Cost Control:**

Provide an outline of the approach proposed to effect cost control and monitoring throughout the project. The Consultant will be responsible for assisting the Quantity Surveyor to control the project costs within defined parameters.

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j) **Professional Indemnity:**

Submit proof of ability to obtain professional indemnity insurance in the amount of US$2,000,000.
### Evaluation Methodology:

The tender evaluation will be based on required content, completeness, presentation and criteria. A number of important criteria will be considered, of which the fee structure will be only one factor in the Client’s determination of best value. The following are the scoring criteria that will be used, and are listed by means of importance and an overall proportional scale:

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<th>Criteria</th>
<th>Score</th>
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<tbody>
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<td>Experience in the design and Construction of educational type projects by firms.</td>
<td>30</td>
</tr>
<tr>
<td>2</td>
<td>Experience and Qualifications of Project Team in Design and Construction.</td>
<td>25</td>
</tr>
<tr>
<td>3</td>
<td>Conceptualization of Design Philosophy.</td>
<td>20</td>
</tr>
<tr>
<td>4</td>
<td>Fee structure</td>
<td>20</td>
</tr>
<tr>
<td>5</td>
<td>Methodology, Programme &amp; Communication Plan</td>
<td>15</td>
</tr>
<tr>
<td>6</td>
<td>Contract Administration Experience</td>
<td>15</td>
</tr>
<tr>
<td>7</td>
<td>Value Added (Experience, expertise, awards, recognition of innovative designs)</td>
<td>15</td>
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2.5 **Schedule:**

The tender evaluation process will follow the following schedule as closely as possible:

- Adverts in local press - August
- Returned to Central Tenders Committee – September
- Evaluation by Technical Steering Committee- October
- Report and Recommendations to CTC - October
- Architects informed of the Results of Tender- October

2.6 **General Conditions:**

The following general conditions are provided as part of the Tender:

a) All tenders shall be firm offers and binding for a minimum period of 60 calendar days following the day of acceptance at the Central Tenders Committee.

b) All tenders are confidential and will be treated as such. All information stated in this tender must be held in confidence by the Consultant.

c) The Cayman Islands Government shall not be liable for any of the costs of preparation, presentation or submission of a tender.

d) The tender submitted by the Consultant will become the property of the Cayman Islands Government and will not be returned.

e) Adjustments to a submitted tender, by telephone, facsimile, email or letter, will not be considered. Should the Consultant wish to alter his tender, he must withdraw it by letter and submit a revised tender prior to the closing date and time as set out in the Invitation to Tender.

f) All conditions and provisions of this tender are deemed to be accepted by the Consultant and incorporated by reference in the Invitation to Tender.

g) The Consultant may be requested to make presentation(s) and be interviewed prior to a final selection. If requested, the Consultant will be expected to attend with the “Director-in-Charge”, the “Project Architect” and the “Design Architect” (if any) (as defined in paragraph 2.1(b) in attendance. The Consultant may wish to have other team members present at the presentation and/or interview. If held, interviews will take place in George Town, Grand Cayman, and all costs related to attending an interview will be the responsibility of the Consultant.

h) The successful Consultant will be notified by telephone and letter sent from the Cayman Islands Government, Central Tenders Committee (CTC). This Invitation to Tender shall apply to and be the contract.

i) Unsuccessful Consultants will be notified by letter after the completion of the evaluations and award of the contract.

j) The Client does not bind itself to accept the lowest fee submitted, nor any Tender.
2.7 **Return of the Tender:**

Tenders are to be submitted as follows:

a) Four (4) signed copies of your tender package are to be submitted in a blank, unmarked, sealed envelope.

b) The proposal is to be submitted no later than 10:00 am, Friday, 22 September 2006.

c) The envelope is to be addressed in the following manner:

Address:

The Secretary  
Central Tenders Committee,  
C/O Department of Treasury, Ground Floor  
Government Administration Building  
Elgin Avenue,  
George Town  
Grand Cayman,  
KY1- 9000  
Cayman Islands

RE: Invitation to Tender for Architectural & Engineering Services for Proposed New High Schools, Tender (06/010)
Part III

Appendices to Project Outline

1 Design Philosophy A1

2 Inception Drawings
   (a) Learning Community Concept A2
   (b) Design and Technology Concept A3

3 Project Briefs
   (a) George Town A4
   (b) West Bay A5
   (c) Frank Sound A6

Appendices to Tender Evaluation Process

4 Tender Checklist A7

5 Project Questionnaires
   (a) Company Project Questionnaire A8
   (b) Project Team Member Questionnaire A9

6 Form of Tender (Part 1, 2 &3) A10-1, A10-2, A10-3

7 Project Staff Hours A11

8 Conditions of Appointment A12

9 Architect and Engineering Services A13

10 Commissioning Services A14

11 Drawings A15