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**Property Framework**

**Further Competition Invitation to Tender (Stage 3)**

**York Central - Professional and Consultancy Services**

**Date: Monday 7 December 2020**

**ProContract Identification Number: DN504761**

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# Introduction

The purpose of this Further Competition Invitation to Tender (ITT) is to award the call-off contract for the York Central Professional and Consultancy Services commission (client-side team). The services are being procured by the York Central Project Team who work on behalf of Homes England and Network Rail working collaboratively to deliver the York Central Project. The “client” is Homes England and Network Rail. The Contracting Organisation is Homes England with a duty of care required to Network Rail. Both client organisations will be able to instruct the appointed client-side team either jointly or individually through the York Central Project Team.

We ask you to respond to the questions detailed in Part 2, Section 6 (Evaluation Criteria) using the Response Form in Part 3 and to return the Response Form with your tender.

This Further Competition ITT is divided into three parts:

## Part 1 – Commission Requirement

- Details the commission requirements.
- Details additional terms and conditions for the Further Competition. The successful Supplier will be subject to both the terms and conditions of this Further Competition and the Framework Contract. Unless otherwise defined in these instructions, terms used shall have the meaning given to them in the Framework Contract.

## Part 2 – Instructions for Submitting a Response

- Contains important information and instructions on preparing and submitting a tender response. Please read these instructions carefully prior to submitting your tender response.
- Outlines the evaluation criteria which will be used for assessment. It is important that Suppliers familiarise themselves with the criteria and ensure they are considered when compiling their tender response.

## Part 3 – Standard Forms

- Contains the standard forms required to be completed and returned by the Supplier when submitting a tender response. **Suppliers may use their own templates complete the forms if they wish, as long as they respond to all questions and are mindful of the page limits specified for each question.**

## Part 1 - Commission Requirements

### 1. Commission Background

#### Project Background

- 1.1. York Central is one of the largest city centre development opportunities in the North of England and has the potential to deliver up to 2,500 homes and up to 112,000m<sup>2</sup> commercial floor space in a world class location on brownfield land directly adjacent to York Railway Station. The site is critical for the City's Local Plan and has the potential to transform the economy of this historic city and the wider region by generating £1.1bn of growth. The site will also enable a £50m extension to the National Railway Museum and a new western entrance to York Railway Station, which links the city directly to London as well as the other Northern Powerhouse cities such as Manchester, Newcastle and Leeds.
- 1.2. With a high house price to earnings ratio, York has significant affordability challenges, compounded by a chronic lack of supply. York Central provides an opportunity for Homes England with fellow majority landowner Network Rail, to unlock land in this strategically significant location, enabling more homes to be built where they are needed.
- 1.3. The city has two world-class universities, 40% of residents are university educated but despite these high-skills levels, York's wages fall below the national average due to a disproportionate skew towards low value sectors such as accommodation and food, retail and care. This is enforced by an absence of Grade A office accommodation in the city centre. The prominent location of York Central and its excellent connectivity means that York Central will provide opportunities for organisations to relocate within Grade A office accommodation, providing opportunity for economic growth not only for York but for the wider North of England as well as contributing significant housing growth and addressing of housing needs in the city.
- 1.4. The 45-hectare York Central site has been stalled for over 40 years and has been subject to previous failed marketing attempts reflecting the once fragmented ownership and prohibitive up-front infrastructure requirements. In recent years, Homes England and Network Rail have responded to this by working in partnership with City of York Council and the National Railway Museum. The site has been assembled for future development, outline planning consent and the necessary funding to deliver upfront infrastructure works has now been secured.
- 1.5. In December 2019, Outline Planning Application (Ref: 18/01884/OUTM) (OPA) was approved with all matters reserved for the redevelopment of York Central to provide a mixed-use development of up to 379,729m<sup>2</sup> of floorspace Gross External Area (GEA) primarily comprising:
  - up to 2,500 homes (Class C3),
  - between 70,000m<sup>2</sup> and 87,693m<sup>2</sup> of office use (Class B1a),
  - up to 11,991 m<sup>2</sup> GEA of retail and leisure uses (Classes A1-A5 or D2),

- hotel with up to 400 bedrooms (Class C1),
- up to 12,120m<sup>2</sup> GEA of non-residential institutions (Class D1) for expansion of the National Railway Museum,
- multi-storey car parks and;
- provision of community uses all with associated works including new open space, ancillary car parking, demolition of and alterations to existing buildings and associated vehicular, rail, cycle and pedestrian access improvements.

1.6. A link to a CGI flyover of the site is [here](#).

1.7. A Section 106 Agreement is in place and Network Rail and Homes England are in the process of discharging several planning conditions relating to the outline planning consent.



**York Central Illustrative Masterplan**

1.8. One of the challenges that has prevented York Central being developed previously is the high cost of the abnormal infrastructure required to enable the site to be utilised to its potential. The site is bound by railways on all sides and has only two existing points of vehicular access, Salisbury Terrace tunnel and Leeman Road tunnel which both have height restrictions. This limited access meant that any significant new development would need to include the creation of a new access route.

- 1.9. The abnormal infrastructure costs at York Central are of the order of £155m. The York Central partners have secured a range of funding to address this cost and enable the site to be developed. Principal funding sources include MHCLG, WYCA, LEPs; and CYC Enterprise Zone backed grants/loans.
- 1.10. A reserved matters planning application (Ref. 20/00710/REMM) (RMA) was submitted in April 2020 for Phase 1 Infrastructure Works at York Central including layout, scale, appearance, landscaping and access for the construction of a primary vehicle route and associated roads, infrastructure, landscaping; and alterations to the existing road network pursuant to the outline planning permission 18/01884/OUTM. The application was approved at planning committee on 12 November 2020.
- 1.11. In addition to the RMA, a Stopping Up application has been submitted by Homes England, Network Rail and National Railway Museum in respect to the stopping up of part of Leeman Road, York in line with the masterplan proposals.
- 1.12. The applicants are currently in discussions with Department for Transport to ask the Department to put the Stopping Up Order to the Planning Inspectorate for an Inquiry, potentially utilising the Virtual Inquiry.
- 1.13. In accordance with the outline planning consent, clearance works have started on site and a number of buildings are due to be demolished early in early 2021 in readiness for the infrastructure works to commence. The current programme provides for the infrastructure works to be completed by March 2024, in line with the funding requirements of MHCLG.
- 1.14. The governance of York Central is clearly defined and implemented through a collaboration agreement between Network Rail and Homes England. In addition, there is a Partnering Agreement between Homes England, Network Rail, City of York Council and National Railway Museum. This Agreement sets out clear identification of roles and responsibilities for each party and recognises the roles of Homes England, and Network Rail, as the majority landowners and promoters of site development.
- 1.15. To date, City of York Council has led on the design of the infrastructure works on behalf of the York Central Partnership. City of York Council have been supported by a client-side consultant team comprising Arup, Avison Young, Allies and Morrison, Gustafson, Porter and Bowman; and Turner and Townsend. City of York Council also commissioned John Sisk & Son UK for Early Contractor Engagement including developing the RIBA Stage 4 Design for the infrastructure works.

## 2. The Services

- 2.1 This commission seeks professional and consultancy services to directly support the York Central Project Team in delivering York Central. It is a wide-ranging appointment and therefore, it is not possible to detail every element of the proposed instruction.
- 2.2 Homes England and Network Rail appointed a Project Director and Senior Development Manager (York Central Project Team) in 2019 to deliver York Central on behalf of Network Rail and Homes England. The

Project Team now wishes to procure its own Professional and Consultancy Services to assist in delivering the Project.

2.3 The Project Team requires support to deliver the following tasks over the next 6-12 months:

- Validate phase 1 infrastructure design and secure contractor for implementation of infrastructure works. (Option to novate the ECI contractor John Sisk and Sons UK procured by City of York Council).
- Creating and reviewing where appropriate the existing project programme and risk register
- Manage the implementation of the recommendations from on-going due diligence work
- Manage the on-boarding of grant funding and other investment
- Review plot layouts and infrastructure proposals to ensure optimisation of development areas.
- Develop phase 1 residential and commercial schemes.
- Develop further infrastructure package designs (including western station entrance, park/open space, Coal Drop Square, Museum Square, Cinder Lane footbridge, Marble Arch connection and Kingsland Terrace connection).
- Develop site wide strategies for:
  - Archaeology
  - Open space (delivery and management)
  - Meanwhile uses
  - Parking
  - Community uses
  - Digital Media and Utilities
  - Develop Housing Strategy to include:
    - Affordable Housing
    - Identification of potential Registered Providers
    - Appropriate housing mix
    - Community led housing initiatives
    - Extra care and retirement living provision
    - Self-Build provision
- Discharge of planning conditions
- Procurement of investment and delivery partners



- Secure reserved matters consent for the development parcels
- Financial modelling of phase 1 residential and phase 1 commercial and site wide financial viability
- Prepare occupier strategy to list potential occupiers and their commercial requirements linked to Phase 1 and 2 commercial.

2.4 Please note that this list is not exhaustive and additional services may be required from the successful Suppliers, arising from the direction of the project, the procurement of investor and developer partners and any issues which may arise.

2.5 The appointed client-side team will work directly with the Project Team and have regular progress meetings.

2.6 The Supplier(s) will provide the following services:

- Property Advisory Services
- Land and Property Agency Services
- Estate Management Services
- Property Investment, Appraisal, Development Monitoring and Financial Services
- Valuation Services
- Lead Consultant and Project Management Services
- Development Structures and Partnering

2.7 Suppliers are invited to tender either individually, or via a consortium. Suppliers are requested to appoint suitably experienced sub-consultants where appropriate. The lead Framework Supplier must take full responsibility for the management and payment of all subcontractors. Homes England and Network Rail will have no role in managing subcontractors.

2.8 Please note that Homes England and Network Rail reserve the right to select/reject firms and or services from any proposed consortia.

2.9 Homes England and Network Rail will appoint one Supplier to provide property services. The selected Suppliers will be appointed by Network Rail and Homes England (the clients) as exclusive advisers to the York Central Project Team for a period of five years. Review dates / break clauses will be incorporated into the appointment to ensure project requirements and expectations are met.

2.10 This is a high profile project and the client requires the proposed team to include the appropriate level of senior resource and to be able to draw upon a highly experienced team who have a proven track record in the provision of advice to support the delivery and progression of such large scale, complex projects. The client requires Suppliers to provide a team of individuals with exceptional track records of the types of services required, an ability to provide a solution focussed service, agility and the ability to work to tight timescales.



2.11 The required services, fee, resourcing and payment for specific tasks will be agreed prior to instruction of each of those tasks. Task orders will be instructed through the TMS system and will define:

- The scope of works to be provided
- Milestones/Outputs and timescales of delivery
- Requirements from the client team
- Fee and invoicing arrangements

### 3. Key Deliverables

2.12 This is a wide-ranging appointment and therefore, it is not possible to detail every element of the proposed instruction. It is anticipated key deliverables may include providing advice to the Project Team on the following range of services:

#### **Property Advisory Services**

2.13 Provide strategic advice to support delivery options including:

- market research and market advice for occupation, investment and development.
- forecasts on future movements in key markets and relevant indices such as House Price Index, commercial property rents, yields and cost inflation.

2.14 Housing market assessments

2.15 Advise on delivery models including public body land asset transfers, joints ventures and public private partnerships.

2.16 Review projects, strategies or programmes to ensure that delivery objectives, financial targets and regulatory requirements are achieved.

2.17 Advise on contingent assets and liabilities; including clawback and overage agreements and restrictive covenant releases.

#### **Land and Property Agency Services**

2.18 Provide a full property agency service for the acquisition and disposal letting of land and property assets and investment and joint venture vehicles acting jointly with other agents when required.

2.19 Undertake the acquisition of land and buildings by agreement or compulsory purchase and advise on potential acquisition approaches including options, conditional and unconditional purchases and joint ventures.

2.20 Identify acquisition opportunities, appraise, review and short list properties against specified criteria, negotiate Heads of Terms and advise on the purchase price, level of compensation and terms of any existing occupations.

- 2.21 Undertake soft-market testing of property and investment assets and delivery options with prospective delivery/investment partners and members of Homes England's Delivery Partner Framework.
- 2.22 Based on market intelligence, prepare marketing strategies, assessing sale and rental values in order to achieve sales and minimise rental voids.
- 2.23 Prepare marketing materials, due diligence information, Development and Planning Briefs for development opportunities, including pre-sale valuation (where required).
- 2.24 Market land and property and investment assets including joint venture opportunities.
- 2.25 Advise and make recommendations to the client through the acquisition, procurement or disposal process including:
- provide guidance on the basis of disposal, respond to queries, appraise bids, prepare scoring matrices, provide feedback to bidders,
  - review the ability of prospective partners to deliver the proposed project / programme, the operational capacity of partners and financial programming,
  - verify the identity and creditworthiness of bidders for fraud prevention and
  - provide an Agency compliant franking valuation supporting the market value of the proposed transaction
- 2.26 Support the legal process of disposal through due diligence up to legal completion working with the appointed legal team.
- 2.27 Provide support in undertaking commercial/legal negotiations with prospective partners.
- 2.28 Provide advice on marketing, affordability and service charge issues.

### **Estate Management Services**

- 2.29 Negotiate and provide advice on lease renewals, rent reviews, covenant releases, synergistic (marriage) values, rating assessments and the calculation of service charges.
- 2.30 Advise on all associated aspects of property management including commercial and residential development and management options for shared and public spaces.
- 2.31 Provide managing agent services to derelict and vacant properties.

### **Property Investment, Appraisal, Development Monitoring and Financial Services**

- 2.32 Provide investment analysis, decision making tools and advice on structuring delivery options and investment portfolios; including Joint Venture and partnering arrangements.

- 2.33 Review national, regional, sub-regional and local markets and undertake financial modelling and development appraisals to identify and assess strategies for the development, acquisition or disposal of assets, projects or programmes
- 2.34 Appraise asset and development opportunities, for all tenures and housing types including 25 and 30 year models of borrowing and rental streams.
- 2.35 Advise on and prepare funding strategies for projects, programmes and infrastructure including potential sources and terms of funding, lender/investor requirements, balance of risk and reward and gap funding requirements.
- 2.36 Provide fully interpretable models/appraisal that can be used to assess delivery options and support the business case to secure project approvals.
- 2.37 Advise the client on emerging and best practice in capital and revenue funding issues (e.g. cross-subsidy, Affordable Housing funding, Section 106/CIL contributions, land gifting, custom build, community land trusts, co-operative and mutual models, co-investment and mechanisms for recycling Public Body funding).
- 2.38 Produce sensitivity analyses.
- 2.39 Produce reports and analyses of stakeholder financial returns and critical drivers including Internal Rate of Return, developer profit, Net Present Value.
- 2.40 Provide advice on investment and development finance and funding variations at regional/sub-regional/local levels including local authority finance and options for stock transfer and stock reinvestment/new build.
- 2.41 Provide advice on alternative options for delivering affordable and intermediate housing.
- 2.42 Provide advice on administration, investment recovery and potential exit strategies for equity and loan investment assets such as shared equity products and rental products.
- 2.43 Identify property related, financial and commercial risks and recommend approaches to their management.
- 2.44 Provide development monitoring services reporting on development activities related to the construction or refurbishment of residential housing; including associated commercial, municipal, civil engineering and infrastructure works where required.
- 2.45 Providing reports for the Agency as an investor, sponsor or funder and associated third party funders where required.

#### **Valuation Services**

- 2.46 Provide an annual valuation service for the land and property portfolio in line with the requirements of the RICS Red Book and Treasury Guidance.

2.47 Provide a full valuation service including pre-sale and post-sale (franking), CPO and rating valuations for the sale and acquisition of land and property assets for financial reporting or disposal purposes.

#### **Lead Consultant and Project Management Services**

2.48 Liaise as necessary with client, consultant, legal and project teams.

2.49 Act as lead consultant and manage other consultants appointed by the client.

2.50 Manage sub-consultants where required to deliver coverage across all areas of the Framework and across all services.

2.51 Provide a project management service.

#### **Development Structures and Partnering**

2.52 Provide the full range of property services associated with the design, implementation, monitoring and winding up of development structures and partnering arrangements.

2.53 Review best practice in the market and summarise recommendations.

2.54 Review existing and proposed partnership arrangements.

2.55 Provide property market, valuation, development appraisal and financial modelling services associated with participating in development structures and partnership arrangements.

2.56 Involvement throughout the due diligence process, liaising with other disciplines such as legal and financial advisors as required.

**Please note that the deliverables listed are not exhaustive and additional services may be required from the successful Suppliers, arising from the direction of the project, the procurement of investor and developer partners and any issues which may arise.**

## **4. Site Information**

4.1 Further information on York Central can be found at the following links:

4.2 Outline planning application and supporting documentation 18/01884/OUTM:

<https://planningaccess.york.gov.uk/online-applications/applicationDetails.do?keyVal=PDE3ZZSJoB800&activeTab=summary>

4.3 Reserved matters planning application and supporting documentation:

<https://planningaccess.york.gov.uk/online-applications/applicationDetails.do?keyVal=O8W1VNSJMXGoo&activeTab=summary>

## 5. Indicative Programme

5.1 Suppliers should note the indicative programme dates in the Tender Schedule in Part 2. The commencement date is 1 March 2021 and the term of the appointment will be for five years.

## 6. Management

6.1 The Suppliers will be managed by the York Central Project Team who work on behalf of Homes England and Network Rail. The Project Team comprises a Project Director and a Senior Development Manager. All instructions to Suppliers will be given by the Project Team.

6.2 The Suppliers will need to work closely with other members of the consultant team and their sub consultants. Suppliers may also be required to work with the project partners (National Railway Museum and City of York Council) and their consultants and any other stakeholders as required.

### Meeting Requirements:

#### Start-up meeting

6.3 The start-up meeting will be held on 1st March 2021. The details of the meeting will be provided nearer the time. Key members of the Supplier team should attend the start-up meeting.

#### Review meetings

6.4 It is anticipated that review meetings will be held on a monthly basis, however the frequency of meetings will depend on deliverables.

#### Poor Performance Meeting

6.5 These meetings will hopefully not be required. However, if poor performance is repeated following escalation to the Supplier's Key Personnel to resolve the issue, as required in the Framework Management Schedule of the Framework Contract, the Framework Manager must be notified and Homes England may call for a Poor Performance Meeting. Beforehand, Homes England will present areas of concern so that the Supplier and Homes England can discuss what happened and why, what will be done to prevent it happening again and how matters will improve. The Supplier subject to such a meeting would be expected to outline in writing in a Rectification Plan afterwards what improvements/modifications they will be putting in place. There will be a maximum of two Poor Performance Meetings before termination of the commission.

## 7. Payment

7.1 The fee for specific tasks and associated payment terms will be agreed with each task order.

## Other Requirements

### 8. Collateral Warranty

- 8.1 Collateral Warranties will be required to ensure that work/services provided by Suppliers can be relied on by developers, funders, and purchasers, acquiring legal interests in Homes England and Network Rail land.
- 8.2 The Framework Supplier should obtain appropriate warranties from any subconsultants if required.
- 8.3 Please note that as the provision of Collateral Warranties is a requirement of the contract there must not be any associated costs for the Supplier to provide these.

### 9. Novation of Services

- 9.1 Suppliers will be required to work with potential developer and investor partners and the selected infrastructure contractor. However, there may be a requirement to novate the Supplier to a developer or investor partner. Should this be the case, Suppliers will be notified at the earliest opportunity.

### 10. Insurance

- 10.1 The total liability levels of the Supplier to Homes England and Network Rail are consistent with the level of insurance required by Framework members.

### 11. Termination

- 11.1 Should performance during the period of this appointment prove unsatisfactory following the Poor Performance meeting provisions set out in the Management section above, Homes England will exercise its right under the Termination and Suspension of the Contract clause in the Framework Contract to give notice to terminate the arrangement with immediate effect.
- 11.2 If the services are no longer required, for whatever reason, then Homes England reserves the right to terminate the appointment and pay for services completed at that point.

### 12. Conflict of Interest

- 12.1 Homes England will exclude the Supplier if there is a conflict of interest which cannot be effectively remedied. The concept of a conflict of interest includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.
- 12.2 Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Supplier to inform Homes England, detailing the conflict in a separate Appendix.

## 13. Confidentiality

- 13.1 This Further Competition ITT and associated information is confidential and shall not be disclosed to any third party without the prior written consent of Homes England. Copyright in this Further Competition ITT is vested in Homes England and may not be reproduced, copied or stored on any medium without Homes England's prior written consent.
- 13.2 Suppliers shall not undertake, cause or permit to be undertaken at any time any publicity in respect of this Further Competition process in any media without the prior written consent of Homes England.

## 14. Health and Safety

- 14.1 Homes England takes health and safety very seriously and expects all Suppliers to do the same. All Suppliers must adhere to the Health and Safety obligations in the Framework Contract and the following Homes England policies where applicable:
- Homes England Safety, Health and Environment Policy
  - Homes England Asbestos Policy
  - Homes England CDM Policy



## Part 2 - Instructions for Submitting a Response

### 1. General

- 1.1 The Further Competition deadline is **noon Friday 15 January 2021** and tender responses **must** be submitted on ProContract. Please regularly check ProContract for any amendments to the Further Competition deadline. For all ProContract portal issues please contact:  
[ProContractSuppliers@proactis.com](mailto:ProContractSuppliers@proactis.com).
- 1.2 Suppliers **must** ensure that suitable provision is made to ensure that the submission is made on time. Any tender responses received after the Further Competition deadline shall not be opened or considered unless Homes England, exercising its absolute discretion, considers it reasonable to do so. Homes England, may, however, at its own absolute discretion extend the Further Competition deadline and shall notify all Suppliers of any change via ProContract.
- 1.3 **Please note all communications during the tender period will be via the ProContract website. All Suppliers that have registered their interest for the Procurement will receive a direct email notification from ProContract on any updates via the Suppliers registered email address. No approach of any kind should be made to any other person within, or associated with, Homes England. It is the Suppliers responsibility to check the ProContract website for any updates to the Procurement process. No claim on the grounds of lack of knowledge of the above mentioned item will be entertained.**
- 1.4 The Supplier should check the Further Competition ITT for obvious errors and missing information. Should any such errors or omissions be discovered the Supplier must send a message via the messaging function on ProContract. No alteration may be made to any of the documents attached thereto without the written authorisation of Homes England. If any alterations are made, or if these instructions are not fully complied with, the tender response may be rejected.
- 1.5 All clarification requests must be sent using ProContract no later than **noon Friday 8 January 2021**. Any queries submitted after this will not be answered. Homes England will respond to clarifications as soon as practicable. **Please note that Homes England will not respond to clarifications between 18 December 2020 and 1 January 2021 (inclusive).**
- 1.6 Suppliers should specify in their clarification questions if they wish the clarification to be considered as confidential between themselves and Homes England. Homes England will consider any such request and will either respond on a confidential basis or give the Supplier the right to withdraw the clarification question. If the Supplier does not elect to withdraw the question and Homes England considers any clarification question to be of material significance, both the question and the answer will be

communicated, in a suitably anonymous form, to all prospective Suppliers who have responded. If Suppliers consider that page limits set out in Section 6 (Evaluation Criteria) are insufficient to provide the information required by the question then a clarification request should be raised. No guarantee can be given that the page limit will be increased.

1.7 Tender responses must not be accompanied by statements that could be construed as rendering the tender response equivocal and/or placing it on a different footing from other Suppliers. Only tender responses submitted without qualification strictly in accordance with the Further Competition ITT (or subsequently amended by Homes England) will be accepted for consideration. Homes England’s decision on whether or not a tender response is acceptable will be final.

1.8 Tender responses must be written in English.

1.9 Under no circumstances shall Homes England incur any liability in respect of this Further Competition or any supporting documentation. Homes England will not reimburse the costs incurred by Suppliers in connection with the preparation and submission of their tender response to this Further Competition.

1.10 Homes England reserves the right to cancel this Further Competition process at any time.

1.11 All services will be in line with the Homes England Property Framework Terms and Conditions.

## Tender Schedule

Milestone	Date	Notes
Issue of Invitation to Tender	Monday 7 December 2020	
Clarifications period	Monday 7 December to Wednesday 16 December 2020	<p>Clarifications, queries and questions are welcomed STRICTLY VIA THE E-TENDERING SYSTEM. Any clarifications received will be answered and responses will be issued to all Suppliers.</p> <p>Clarification responses will be issued as promptly as possible.</p> <p><b>The Clarifications Period will close at noon on Friday 8 January 2021.</b> Clarifications received after this period will not be answered.</p> <p><b>Please note that Homes England will not respond to clarifications between 18 December 2020 and 1 January 2021 (inclusive).</b></p>
Final Tender Responses	Noon Friday 15 January 2021	Suppliers must enclose all elements outlined in Submission Instructions via the Etendering System. <b>Check the E-Tendering System regularly to see if there are any amendments.</b>

<b>Tender Assessment</b>	Monday 18 January 2021 to Friday 12 February 2021	Tender Assessment Homes England and Network Rail will convene a group of at least three markers who will all independently undertake the Quality and Price Assessment on all Tenders received.  All scores and detailed comments will be collated and discussed and agreed at a consensus meeting to provide the overall score for each Supplier.
<b>Supplier Meetings</b>	2-4 February 2021	Suppliers meetings may be held to discuss tender submissions with Suppliers 2-4 February 2021
<b>Outcome of Tender Assessment</b>	Friday 12 February 2021	Suppliers will be notified of the outcome of the tender assessment
<b>Standstill period</b>	15 – 26 February 2021	There will be a 10-day Standstill Period for challenge by unsuccessful Suppliers.
<b>Contract Award/ Commission Commences</b>	1 March 2021	Inception Meeting

## 2. Quality

- 2.1 A Response Form template has been provided in Part 2 to respond to the Quality questions detailed in Part 2, Section 6 (Evaluation Criteria). The Response Form must be **completed and returned** as part of the tender response.
- 2.2 Suppliers must provide information on proposed staff in Part 3, Section 3.1 Response Form and Section 3.2 Price. If the Supplier is a consortium or intends to sub-contract the Services, in whole or in part, then it should specify precisely which economic operator shall perform the Services (or parts thereof).

## 3. Pricing

- 3.1 Part 3, Section 3.2 Price must be completed and returned as part of the tender response.
- 3.2 The pricing approach for this Further Competition is:
- time charge and;
  - provision of a blended rate
- 3.3 Suppliers are reminded that day rates for all individuals must be the agreed Framework Contract rates unless discounted rates are offered and will be used for all of the services.

## 4. Evaluation

- 4.1 Tender responses will be evaluated on the basis of the overall most economically advantageous Tender (MEAT) submitted to Homes England and Network Rail. The evaluation criteria (and relative weightings)

that Homes England and Network Rail will use to determine the most economically advantageous Tender are set out in Section 6 (Evaluation Criteria) below and the scoring approach is detailed in the Worked Example. Scores will be rounded to two decimal places.

4.2 Evaluators will initially work independently. Once they have completed their independent evaluation they will meet to discuss, understand and moderate any differences they have via a consensus meeting, where a single consensus score for each question will be agreed.

4.3 Award decisions will be subject to the standstill period. Unsuccessful Framework Suppliers will be provided with their scores and feedback to explain the award decision.

4.4 Supplier meetings will be held between 2 – 4 February 2021 to meet key members of the consultant team and clarify any matters that may arise from the tender response. These meetings will form part of the evaluation process.

## **5. Documents to be Returned**

5.1 Suppliers are expected to provide the following information in response to this Further Competition ITT:

- A completed Response Form
- Information on Pricing (Part 3, Section 3.2)
- Supporting CV's for staff proposed to undertake this commission (no more than 2 pages each)

5.2 Suppliers may provide this information in their own company template as long as all the questions are answered and the page limits for each question are adhered.

## 6. Evaluation Criteria

Quality will account for **80%** of the Overall Score. The following scoring methodology will apply:

**5 – Excellent** Satisfies the requirement and demonstrates exceptional understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.

**4 – Good** Satisfies the requirement with minor additional benefits. Above average demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.

**3 – Acceptable** Satisfies the requirement. Demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services.

**2 - Minor Reservations** Some minor reservations of the Supplier’s understanding and proposed methodology, with limited evidence to support the response.

**1 – Major Reservations/Non-compliant** Major reservations of the Supplier’s understanding and proposed methodology, with little or no evidence to support the response.

**0 - Unacceptable/Non-compliant** Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Supplier has the understanding or suitable methodology, with little or no evidence to support the response.

### PLEASE NOTE:

If your response scores 0 or 1 for any one question your overall submission will be deemed as a fail.

Any text beyond the specified page limits below will be ignored and will not be evaluated.

Homes England will not cross-reference to other answers when assessing quality responses.

Evaluators will initially work independently. Once they have completed their independent evaluation they will meet to discuss, understand and moderate any differences they have via a consensus meeting, where a single consensus score for each question will be agreed.

Number	Criteria	Demonstrated by	Weighting
1	<p><b>Technical Merit of Proposal</b></p> <p><b>Where you have acted as the lead property adviser on a project similar to York Central; please explain your role and how</b></p>	<p>Detail your method and approach explaining how the commission was undertaken</p> <p>The services that were delivered</p> <p>Where you worked with other Suppliers</p> <p>Where relevant identification of areas of innovation</p>	30%

	<p><b>successful you think you were in delivering the project.</b></p> <p><b>PAGE LIMIT:</b> Maximum five A4 sides, in Arial, 11-point font.</p>	<p>Where appropriate identify the potential impact of external influences and stakeholders</p> <p>Areas where your advice enabled clients to achieve best value</p> <p>Supported by relevant examples, where applicable, demonstrating how they are relevant to York Central.</p>	
2	<p><b>Staff and other Resources</b></p> <p><b>Who will undertake the commission and why have they been chosen?</b></p> <p><b>PAGE LIMIT:</b> Maximum five A4 sides, in Arial, 11-point font.</p>	<p>Who will undertake the commission and why have they been chosen?</p> <p>Identify key members of staff and allocation to the required services</p> <p>Detail the fee rate for each member of your team</p> <p>Supported by CVs for key members of staff</p>	30%
3	<p><b>Management and Communication</b></p> <p><b>Please explain how this commission will be managed and the methodology you will use.</b></p> <p><b>PAGE LIMIT:</b> Maximum three A4 sides, in Arial, 11-point font.</p>	<p>How will the commission be managed?</p> <p>Who will be responsible for reporting to the Client?</p> <p>Who will manage the team?</p> <p>Where subcontracting arrangements are in place, who will manage the contract?</p> <p>Who will attend site visits / client meetings?</p> <p>Communication strategy</p> <p>Supported by relevant examples, where applicable, demonstrating how they are relevant to the approach proposed</p>	10%
4	<p><b>Value Added</b></p> <p><b>Please provide examples of how you will bring added value to this commission above our expectations. What would you bring to this project to</b></p>	<p>Please provide examples of how you will bring added value to this commission.</p> <p>What would you bring to this project to differentiate you from your competitors?</p>	10%

	<p><b>differentiate you from your competitors?</b></p> <p><b>PAGE LIMIT:</b> Maximum three A4 sides, in Arial, 11-point font.</p>		
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Price will account for 20% of the Overall Score. The lowest price will gain the maximum marks.

Criteria	Demonstrated by	Weighting
Price	<ol style="list-style-type: none"> <li>1. Confirm day rates and hourly fees for each member of your team.</li> <li>2. Provide a blended day rate</li> <li>3. Please specify your methodology for calculating fixed fees for specific items of work.</li> </ol>	20%



## Worked Example

### How your quality scoring will be used to give a weighted score

Bidder	Score out of 5	Weighting	Weighting Multiplier	Weighted Score	Total Weighted Score
Supplier A	3	30%	6	18	54
	4	30%	6	24	
	3	10%	2	6	
	3	10%	2	6	
Supplier B	5	30%	6	30	68
	4	30%	6	24	
	3	10%	2	6	
	4	10%	2	8	
Supplier C	2	30%	6	12	n/a (fail)*
	1	30%	6	n/a	
	3	10%	2	6	
	2	10%	2	4	

\* in the example above Supplier C's pricing will not be scored

## Part 3

### 3.1 Response form

To enable Homes England and Network Rail evaluate your tender, we require Suppliers to respond to the questions below whilst making reference to the evaluation section Part 2 Section 6.

Please refer to the evaluation section for page limits for each question. Any text beyond this will be ignored and will not be evaluated.

<b>Framework:</b>	[insert]
<b>Project Title:</b>	[insert]
<b>ProContract Identification Number:</b>	DN504761
<b>Supplier:</b>	[insert]
<b>Date:</b>	[insert]

## 1. Technical Merit of Proposal

Where you have acted as the lead property adviser on a project similar to York Central; please explain your role and how successful you think you were in delivering the project.

## 2. Staff and other Resources

Who will undertake the commission and why have they been chosen?

## 3. Management and Communication

Please explain how this commission will be managed and the methodology you will use.

## 4. Value Added

Please provide examples of how you will bring added value to this commission above our expectations. What would you bring to this project to differentiate you from your competitors?

## 3.2 Price

1. Confirm day rates and hourly fees for each member of your team.
2. Provide a blended day rate.
3. Please specify your methodology for calculating fixed fees for specific items of work.

[enquiries@homesengland.gov.uk](mailto:enquiries@homesengland.gov.uk)

0300 1234 500

[gov.uk/homes-england](https://gov.uk/homes-england)

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