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## Development Monitoring and Management Services Framework

Further Competition Invitation to Tender (Stage 1 Under FTS  
Threshold)

Centenary Quay Phase 6 and 4b Development Monitoring

Issue Date: 7<sup>th</sup> June 2022

ProContract Identification Number: DN615940

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# Introduction

The purpose of this Further Competition Invitation to Tender (ITT) is to award the call-off contract for the above commission.

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

This Further Competition ITT is divided into 3 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.

## Part 1 - Commission Requirements

### 1. Commission Background

Homes England owns the site at Centenary Quay Southampton. The site was transferred from South East England Development Agency (SEEDA). SEEDA procured Crest Nicholson as a development partner and individual phases are drawn down under a bespoke development agreement.

The residential element has been largely developed out by Crest Nicholson. There are two phases left of which Phase 4b is being completed (completion due October 2022) and Phase 6 has been submitted for reserved matters by Crest.

The Development Agreement is a single document combining both conditional and unconditional contractual terms. There is a separate Development Agreement for Phase 4b (which also combines Phase 4a which has been completed and is not the subject of this appointment) and Phase 6. The Development Agreement is conditional. Phase 4b is unconditional (conditions having been met) and work is largely completed on site with development under licence rather than building lease. Phase 6 is conditional, primarily on securing reserved matters planning approval.

AECOM have been providing the development monitoring services for Phase 4b but are coming to the end of their original appointment with a short period before the works are practically completed. This commission is for development monitoring services at Phase 6 and completion of Phase 4b (July to October). Homes England reserves the right to appoint for either element, both or neither.

### 2. Objectives

The Development Agreement with Crest Nicholson is a bespoke arrangement inherited by Homes England from SEEDA's procurement and contracting of Crest. The Development Agreement does not provide a requirement for a compliance inspector/monitoring surveyor role. The rationale for monitoring of the development at Phase 4b and Phase 6 arises from Homes England's evolving approach on standard disposals via its building lease and the current focus on building safety generally.

### 3. The Services

The services are those set out in the Compliance Inspector's Scope of Works as attached and amended in light of the bespoke contract:

#### Summary

**Reporting** vi) Six weekly reports for Phase 4b, monthly (subject to finalising) for Phase 6

1.2 House Build Targets and Construction Related Deadlines are not relevant contractual terms. Monitoring against programme is.

1.3.5 There are no non-residential Units.

1.4 Offsite manufacture and modern method of construction is not a contractual requirement and therefore not required to be monitored. Sign off at completion is required

3.1b Tender Form 5 is not relevant

4.1a Not relevant as freehold of affordable housing blocks may be transferred separately

4.1c Not relevant as Construction Related Deadlines are not included

4.1e Not relevant as Building for a Healthy Life was not included within tender submission

4.1f Not relevant as offsite manufacturing and other advance construction technologies are not contractual requirements

4.1g Not relevant for Phase 4b

4.1p Not relevant as Reduction Events are not contractual terms

4.1q Not relevant as Overage Reduction is not a contractual term

4.2 Not necessary for Phase 4b

4.3 Not relevant for non-residential units. Compliance certificates will be required for completion of Interim Completion of Blocks and Practical Completion under paragraph 17.7 of Phase 4 Development Agreement (and equivalent for Phase 6).

5.2 Overage will be calculated separately.

#### **4. Key Deliverables**

Key deliverables are as set out in the Services and Scope of Services.

#### **5. Site Information (if appropriate)**

Centenary Quay is located on the east bank of the river Itchen, Southampton.

Phase 4b is a 27 storey tower with 161 new flats and associated car park. It is anticipated it will be wind and watertight by the time of appointment of these services to run from August 22 to anticipated practical completion in October 2022. Interim Completion and disposal of the freehold to Crest is anticipated in July/August 22. The reserved matters application is 16/00148/REM.

Phase 6 constitutes 42 houses and 126 flats. The reserved matters reference is 22/00588/REM.

The reserved matters applications for Phase 4b and Phase 6 can be found at Southampton City Council’s Planning Portal.

The latest report for Phase 4b is provided alongside the Development Agreements for Phase 4 and 6.

## 6. Indicative Programme

Suppliers should note the indicative programme dates when preparing their Programme information in the Response Form.

Key Delivery Milestones For Phase 4b	Anticipated Date
Commencement Date	July 2022
3 x 6 weekly visits and reports including final report and practical completion certificate	August, September and November
Completion Date	November 2022

Key Delivery Milestones For Phase 6	Anticipated Date
Commencement Date – Inception and Initial Report	January 2023
Monthly (subject to review and agreement) visits and reports	Monthly visits and reporting (c40 months)
Completion Date – Practical Completion and Final Report	May 2026 (to be assumed)

## 7. Management

### Meeting Requirements:

- **Start-up meeting**

A start up meeting will be held with Homes England

- **Review meetings**

Regular inspections will be coordinated with Crest where any requests for information will be garnered. Subsequent meetings between Homes England and the consultant will be held as and when required.

- **Poor Performance Meeting**

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.

## **8. Key staff (optional)**

Please see the Scope of Services for skills and therefore personnel requirements.

## **9. Risks**

There are risks associated with delays to the Phase 6 programme as a result of planning.

There is also a risk that on site or off site events influence the focus of reporting. Health and safety challenges being an obvious example.

## **10. Payment**

Fees will be paid monthly in arrears (adjusted to conform to the reporting frequency).

## Other Requirements

### 11. Collateral Warranty (if appropriate)

It is not anticipated that a collateral warranty will be required but Homes England reserves the right to request it if it does become relevant.

### 12. Termination

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.

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.

Homes England reserves the right to terminate the appointment and pay for services completed at that point.

### 13. Conflict of Interest

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.

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.

### 14. Confidentiality

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.

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.

## **15. Health and Safety (if applicable)**

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 19:00 on **22nd June** 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 5 working days before the Further Competition deadline shown on ProContract. Any queries submitted after this may not be answered. Homes England will respond to clarifications as soon as practicable.
- 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 20 (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.

## 2. Quality

2.1 A Response Form template has been provided in Part 2 to respond to the Quality questions detailed in Section 20 (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 the Response Form and Resource and Pricing Schedule provided in Part 2. If the Supplier is a consortium or intends to sub-contract the Services, in whole or in part, then it should specify precisely in the Resource and Pricing Schedule which economic operator shall perform the Services (or parts thereof).

## 3. Pricing

3.1 A Resource and Pricing schedule has been provided with this Further Competition ITT which must be completed and returned as part of the tender response.

3.2 The pricing approach for this Further Competition is:

3.2.1 Fee proposal based on the lump sum fee for each activity (report) for each Phase. It is anticipated that a cost for initial report including any set up, subsequent monthly/six weekly reports, and final report. If

reporting frequency is changed it will be assumed the cost of each report will remain the same unless otherwise stated.

3.3 Suppliers should submit day rates in addition to the Resource and Pricing Schedule.

3.4 The list of activities in the Resource and Pricing Schedule is not exhaustive and there may be additional duties/services required that will emerge as work is undertaken. This commission may be extended on client instruction to cover such matters as arise, based on a time charged fee schedule completed in the tender response. The commission will only be extended if the services relate to the original objective of the overall call off contract.

3.5 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. The evaluation criteria (and relative weightings) that Homes England will use to determine the most economically advantageous Tender are set out in Section 20 (Evaluation Criteria) below and the scoring approach is detailed in Section 25 (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 if over the EU Services threshold. Unsuccessful Framework Suppliers will be provided with their scores and feedback to explain the award decision

## 5 Documents to be Returned

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

- Completed Response Form
- Completed Resource and Pricing Schedule
- Supporting CV's for staff proposed to undertake this commission (no more than 2 pages each)

## 6 EVALUATION CRITERIA

Quality will account for 30% 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
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1	<p><b>Technical Merit of Proposal</b></p> <p>Demonstration of understanding of this ITT and Scope of Services and how that will be turned into implementation of the services.</p> <p><b>PAGE LIMIT:</b> Maximum 4 A4 pages, 11-point Corbel font Excluding example report/proforma</p>	<p>Statement outlining method and approach demonstrating understanding of requirements and explaining how the commission will be undertaken</p> <p>Other commentary on the brief</p> <p>Supported by relevant examples, where applicable, demonstrating how they are relevant to the approach proposed.</p> <p>Example reports or pro forma may be provided.</p>	20%
2	<p><b>Staff and other Resources, Management and Communication</b></p> <p>Demonstration of appropriately skilled and experienced individuals who collectively as a team will deliver the services</p> <p><b>PAGE LIMIT:</b> Maximum 2 A4 pages, 11-point Corbel font exclusive of CVs.</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>How will the commission be managed?</p> <p>Who will be responsible for reporting to the Client?</p> <p>How much time will they devote to it?</p> <p>Supported by resourcing information provided in Resource and Pricing Schedule</p> <p>Supported by CVs for key members of staff</p>	10%

Price will account for 70% of the Overall Score. The lowest price will gain the maximum marks with other prices expressed as a proportion of the best score using the maths explained in the worked example below.

Criteria	Demonstrated by	Weighting
Price	Completed Resource and Pricing Schedule	70%

## 7 Worked Example

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

Bidder	Question	Score out of 5	Weighting	Weighting Multiplier	Weighted Score	Total Weighted Score
Supplier A	1	3	20%	4	12	20
	2	4	10%	2	8	
Supplier B	1	5	20%	4	20	28
	2	4	10%	2	8	
Supplier C	1	2	20%	4	8	n/a (fail)*
	2	1	10%	2	n/a	

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

### Worked example of how your price will be used to calculate a score

Bidder	Form of Tender price	Lowest price/Supplier's price (as %)	Price Score (out of 70)
Supplier A	350	$350/350 = 100\%$	$100\% * 70 = 70$
Supplier B	700	$350/700 = 50\%$	$50\% * 70 = 35$
Supplier C	250	n/a	n/a

### Worked example of Overall Score and Ranking

Bidder	Total Quality Score	Price Score	Total Score	Ranked Position
Supplier A	20	70	90	1
Supplier B	28	35	63	2
Supplier C	n/a	n/a	n/a	n/a



## Part 3

### 3.1 RESPONSE FORM

Framework:	[insert]
Project Title:	[insert]
ProContract Identification Number:	DN [insert]
Supplier:	[insert]
Date:	[insert]

To enable Homes England to evaluate your tender, we require Suppliers to respond to the questions below whilst making reference to the evaluation section above.

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

## **1. Technical Merit of Proposal**

## **2. Staff and other Resources, Management and Communications**

### 3.2 RESOURCE AND PRICING SCHEDULE

The price should be broken down as:

#### Phase 4b

<b>Cost per 6 weekly report</b>	£	
<b>Total cost based on 3 x 6 weekly Reports</b>		£
<b>Final Report</b>		£
<b>Total</b>		£

#### Phase 6

<b>Initial Report</b>		£
<b>Cost per monthly* report</b>	£	
<b>Total cost based on 3 x 6 weekly Reports</b>		£
<b>Final Report</b>		£
<b>Total</b>		£

\* Reporting frequency may change – please indicate any change in cost if frequency changes.

All figures exclusive of VAT

Excel spreadsheet to be embedded by Supplier in response

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