**Multi-Disciplinary Framework 2019 - 2023**

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

**Woolwell, Plymouth**

**Issue Date: 09/06/2021**

## **ProContract Identification Number: DN542701**

Table of Contents

Introduction4

**Part 1 – Commission Requirements**

1. Commission Background5
2. Objectives5
3. The Services5
4. Key Deliverables5
5. Site Information6
6. Indicative Programme6
7. Management6
8. Key Staff7
9. Risks7
10. Payment7
11. Budget8
12. Collateral Warranty8
13. Limitation of Liability8
14. Termination9
15. Conflict of Interest9
16. Confidentiality9
17. Health and Safety10

**Part 2** – **Instructions for Submitting a Response**

1. General11
2. Quality12
3. Pricing12
4. Evaluation13
5. Documents to be Returned14
6. Evaluation Criteria15
7. Worked Example18

**Part 3** – **Response Form**

3.1 Response Form21

3.2 Resource and Pricing Schedule23

**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](#_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**

The PCC land has an approximate capacity for 360 homes with the wider SUE having an allocation for in the order of 2,000 dwellings. An Outline application has been submitted for 360 dwellings on the PCC land by the promoter of the adjoining site (in tandem with an application on their land of 1,640 dwellings). There is a further landowner within the allocation whose land has not been included at this stage / has no live application.

1. **Objectives**

Technical and planning support is required to better understand the Outline applications and to develop a planning strategy which aids collaboration across the landholdings to bring forward the whole allocation.

1. **The Services**

Technical and Planning advice is required to allow Homes England and PCC to develop a strategy to bring forward the PCC land for development, along with the wider allocation. Key to the advice will be whether the live application is considered to be in the best interests of PCC or not and whether an alternative application should be pursued. Technical areas to inform the strategy may include:

1. Planning Overview and analysis
2. Capacity Proving and Masterplanning
3. Access and Movement
4. Ground Conditions and Foundations
5. Services/Utilities
6. Drainage
7. Ecological Issues
8. Historic Environment
9. Air Quality, Noise & Vibration
10. Other Issues

**Phasing, Infrastructure Provision / Contributions and Accesses** are considered to be pivotal areas in terms of progressing the wider allocation. Advice surrounding these issues will be key to the strategy proposed and to informing our onward discussions with other landowning parties and stakeholders. Information provided should have a view to different options which may hold commercial or other advantages. Should the other landowning parties be willing to engage it is anticipated that discussion and agreement on these issues will be key to Homes England’s involvement and ensuring timely delivery of the site.

1. **Key Deliverables**

Provide multidisciplinary services to aid Homes England progress the project.

1. **Site Information (if appropriate)**

The planning applications submitted to South Hams District Council have the reference numbers : **4181/19/OPA & 4185/19/OPA.**

1. **Indicative Programme**

Suppliers should note the indicative programme dates when preparing their Programme information in the Response Form. Suppliers should identify any programme risks and whether they propose different timescales with a view to improving the quality of the output.

|  |  |
| --- | --- |
| **Key Delivery Milestones** | **Anticipated Date** |

Anticipated timescales should be provided by suppliers in their tender return.

1. **Management**

The day to day Homes England contact will be X. Members of Homes England’s Planning and Delivery team will provide input to the project and the supplier may be required to work to them. It is also possible that contacts from PCC may attend any meetings required to discuss the outputs of this commission.

1. **Payment**

Payment for this commission will be on a monthly basis proportionate to the output or as otherwise agreed.

**Other Requirements**

1. **Collateral Warranty**

Collateral warranties will be required for the phase two commission that can be passed onto subsequent developers. The site may be sold to multiple developers and so proposals should account for this.

1. **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.

1. **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.

1. **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.

1. **Health and Safety**

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 currently set at **13:00** on 07/07/2021 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. 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.
  2. **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.**
  3. 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.
  4. 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.
  5. 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.
  6. 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.
  7. Tender responses must be written in English.
  8. 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.
  9. Homes England reserves the right to cancel this Further Competition process at any time.

# Quality

* 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. 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).

# Pricing

* 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.
* The pricing approach for this Further Competition is a lump sum fixed fee
  1. 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.
  2. 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.

1. **Evaluation**
   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.
   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.
   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
2. **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 1 page each)

# EVALUATION CRITERIA

|  |  |  |  |
| --- | --- | --- | --- |
| Quality will account for 50**%** 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 | **Technical Merit of Proposal and Understanding of Project Requirements**  Demonstrate experience (of the acting project team members) in providing due diligence and technical reports for very similar projects, where the site forms part of a wider allocation/ greenfield site and there are interdependencies which need to be evaluated with a view to potential commercial negotiations to ensure that a viable and deliverable consent is brought forward. Explain how the due diligence helped inform the landowner’s strategy and your advice added value.  Demonstrate why your organisation is best placed to deliver this project, clearly setting out the tasks needed to secure a market-facing consent for outline planning permission for residential development on the PCC land. Explain how the commission will be undertaken and what activities will be carried out, based on the services and deliverables set out in the brief. Highlight any risks and mitigation which may impact the activities and cost supplied.  Demonstrate an understanding of the site and the key challenges in terms of planning and delivery. Explain how you would robustly explore the key interdependencies **(phasing,** **provision and** **apportionment of offsite and onsite infrastructure, accesses, possible ransom situations etc)** to help inform a commercially astute planning strategy for the site to deliver housing.  Information on other Consultant input that may be required.  **PAGE LIMIT:**Maximum 8A4 pages, 11-point Corbel font | Statement outlining method and approach explaining how the commission will be undertaken  Schedule of services to be delivered (with costs shown in the Resource and Pricing Schedule)  Information on other Supplier input that may be required  Identification of other information that may be required  Where appropriate identify the potential impact of external influences and stakeholders  Areas where value engineering could be considered to achieve best value  Other commentary on the brief  Supported by relevant examples, where applicable, demonstrating how they are relevant to the approach proposed | 30% |
| 2 | **Staff and other Resources**  Who will undertake the commission, including a lead consultant and all sub-consultants, and their experience.  Identify all members of staff who will be involved and their key strengths and similar experience (CVs of no more than 1 A4 side will be accepted).  How much guaranteed time will staff, particularly identified senior members of the team, devote to the commission (please complete resourcing schedule).  **PAGE LIMIT:**Maximum *3* A4 pages, 11-point Corbel font plus CVs at no more than 1 A4 page per team member | Who will undertake the commission and why have they been chosen?  Identify key members of staff and allocation to the required services  How much time will they devote to it?  Supported by resourcing information provided in Resource and Pricing Schedule  Supported by CVs for key members of staff | 10% |
| 3 | **Management and Communication**  How will the commission be managed, including first point of contact and reporting/communication processes. **NB:** The key contact leading on client communication MUST be Partner / Director level. Any bids without this will be automatically rejected.  Who will manage the team  Presentation of the structure of the team and reporting lines (please include an organagram)  **PAGE LIMIT:**Maximum *2* A4 pages, 11-point Corbel font | How will the commission be managed?  Who will be responsible for reporting to the Client?  Who will manage the team?  Where subcontracting arrangements are in place, who will manage the contract?  Who will attend site visits / client meetings?  Communication strategy | 5% |
| 4 | **Programme**  Provide a programme which will ensure the brief is suitably met. It is anticipated that Phase 1 will meet the timings we have put forward in section 6 of this brief.  Statement on how organisation would get up to speed and timescales for achieving this.  **PAGE LIMIT:**Maximum *2* A4 pages of commentary with separate gantt chart permitted , 11-point Corbel font | When will the commission be complete?  When will key milestones be complete?  What is the programme for the required services?  Are any programme dates we have given considered unachievable or would alternative timings improve the quality of the output?  Identify risks which may affect the programme or costs, what impact they may have, and any mitigation. | 5% |

|  |  |  |
| --- | --- | --- |
| Price will account for 50% 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 | 50% |

1. **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 | 30% | 6 | 18 | 31 |
| 2 | 4 | 10% | 2 | 8 |
| 3 | 3 | 5% | 1 | 3 |
| 4 | 2 | 5% | 1 | 2 |
| Supplier B | 1 | 5 | 30% | 6 | 30 | 45 |
| 2 | 4 | 10% | 2 | 8 |
| 3 | 4 | 5% | 1 | 4 |
| 4 | 3 | 5% | 1 | 3 |
| Supplier C | 1 | 2 | 30% | 6 | 12 | n/a (fail)\* |
| 2 | 1 | 10% | 2 | n/a |
| 3 | 2 | 5% | 1 | 2 |
| 4 | 2 | 5% | 1 | 2 |

\* 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 50) |
| Supplier A | 350 | 350/350 = 100% | 100%\*50 = 50 |
| Supplier B | 700 | 350/700 = 50% | 50%\*50 = 25 |
| 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 | 31 | 50 | 81 | 1 |
| Supplier B | 45 | 25 | 70 | 2 |
| Supplier C | n/a | n/a | n/a | n/a |

# Part 3

# 3.1 RESPONSE FORM

|  |  |
| --- | --- |
| **Framework:** | Multi-Disciplinary Framework 2019-2023 |
| **Project Title:** | Woolwell – Plymouth |
| **ProContract Identification Number:** | **DN542701** |
| **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 and Understanding of Project Requirements** |
|  |
| **2. Staff and other Resources** |
| **3. Management and Communication**  **4. Programme** |

# 3.2 RESOURCE AND PRICING SCHEDULE

Excel spreadsheet to be embedded by Supplier in response

enquiries@homesengland.gov.uk

0300 1234 500

gov.uk/homes-england