



Homes
England

Homes England Property and Financial Professional Services Framework 2022 - 2026

Further Competition Invitation to Tender
(Stage 3 Over FTS Threshold / Stage 1
Under FTS Threshold)



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](#).

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 subject site is located at Bell House, Bell Road, Sittingbourne, Kent (“Site” or “Development”). The Scheme is a Brownfield site with [REDACTED] who is looking to develop 165 open market/Affordable one and two bed flats with parking.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

2. Objectives

Homes England, formerly known as the Homes and Communities Agency ('HCA') is seeking to appoint a Valuer from its Property Professional and Technical Services Framework. The appointed Valuer will provide a full RICS Red Book-compliant valuation, following RICS best practice guidance notes for the development works concerning a loan investment under the Levelling Up Home Building Fund ("LUHBF") programme. All work will be instructed under the standard terms of the Homes England Property and Financial Professional Services Framework 2022 – 2026.

3. The Services

Homes England Requirements for this instruction (Within the standard terms of the Homes England Property and Financial Professional Services Framework 2022 – 2026):

- Land residual value for the proposed Site, and GDV for the completed scheme. Valuation Report to include, a breakdown of the GDV for each home.
- Detailed commentary on sales prices, sales assumptions/rates, demand and absorption rate in the local area.
- Commentary on the proposed management / service charges provision against market norm.
- Additionally, the market value assuming sale within 90 days, such as in the event of distressed scenario.

4. Key Deliverables

The Valuer will work with both the Borrower and the Homes England Transaction Team, who will be the initial point of contact for the transaction.

[REDACTED]

[REDACTED]

Please refer to the document attached to this instruction titled Property and Financial Professional Services Scope of Works.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

6. Management

The valuation report will be instructed by the allocated Homes England Transaction Team, with the results of this report used to confirm that project proposals are acceptable as a condition precedent to funding.

Meeting Requirements:

- **Start-up meeting**

Commission start-up communication will be held within 48 hours of the commission being awarded.

- **Review meetings**

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.

7. Risks

Currently no known specific project risks.

8. Payment

Payment will be made upon receipt of final report to the satisfaction of Homes England and submission of a valid invoice.

Other Requirements

9. 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 may 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

10. 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.

11. 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.

12. 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 17:00 on 30/07/2024 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.

- 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 10 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 By submitting a Tender, each Supplier undertakes that, in the event of its Tender being accepted by Homes England, it will deliver the services and each individual instruction in accordance with the Framework Agreement Terms and Conditions without variation. The Framework Agreement Terms and Conditions shall not be amended in any way and any document submitted as part of the Tender which purports to do so shall have no effect and shall be disqualified. Homes England shall not engage in any negotiations over the terms of the contract either before or after Tender close nor in relation to each individual instruction. By submitting a Tender, a supplier reconfirms acceptance of the terms of the Framework Agreement, without variation other than to put into effect details relating to the supplier and Tender specific information and in respect of each individual instruction made under the Framework Agreement. Suppliers shall be aware that failure to accept the Framework Terms and Conditions in respect of individual instructions may cause the supplier to be suspended or removed from the Framework.

1.10 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.

1.11 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. Suppliers must follow the instructions contained in the Resource and Pricing schedule in relation to completing the schedule and raising clarifications on activities or assumptions during the tender period.

3.2 The pricing approach for this Further Competition is:

- lump sum fixed fee

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 FTS 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
- Supporting CV's for staff proposed to undertake this commission (no more than 2 pages each)

6.EVALUATION CRITERIA

Quality will account for [REDACTED] 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.

Question 1 will be assessed on a pass/fail basis.

Yes = Pass

No = Fail

Number	Criteria	Demonstrated by	[REDACTED]
1	<p>Terms and Conditions Acceptance</p> <p>Please confirm acceptance of the Framework Agreement Terms and Conditions for appointment to the framework and for each individual instruction.</p> <p>By submitting a Tender, each Supplier undertakes that, in the event of its Tender being accepted by Homes England, it will deliver the services and each individual instruction in accordance with the Framework Agreement Terms and Conditions without variation. The Framework Agreement Terms and Conditions shall not be amended in any way and any document submitted as part of the Tender which purports to do so shall have no effect and shall be disqualified. Homes England shall not engage in any negotiations over the terms of the contract either before or after Tender close nor in relation to each individual instruction. By submitting a Tender, a supplier is accepting the terms of the Framework Agreement without variation other than to put into effect details relating to the supplier and Tender specific information and in respect of each individual instruction made under the Framework Agreement. Suppliers shall be aware that persistent failure to accept the Framework Terms and Conditions in respect of</p>	<p>Yes = Pass</p> <p>No = Fail</p>	<p>[REDACTED]</p>

	<p>individual instruction may cause the supplier to be suspended or removed from the Framework.</p> <p>Suppliers will pass this question by accepting the Framework Agreement Terms and Conditions for appointment to the framework and for each individual instruction. If a supplier does not pass this question the supplier will be disqualified.</p>		
2	<p>Technical Merit of Proposal</p> <p>PAGE LIMIT: Maximum 1 x A4 pages</p>	<p>Give an understanding of the brief/scheme</p> <p>What timescales are proposed for a site visit and completing the report?</p>	■
3	<p>Staff and other Resources</p> <p>PAGE LIMIT: Maximum 1 x A4 pages</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>Please provide any examples of previous relevant schemes recently undertaken.</p> <p>Supported by CVs for key members of staff</p>	■
4	<p>Geographic Coverage</p> <p>PAGE LIMIT: Maximum 1 x A4 pages</p>	<p>Which office is the nearest to the Site?</p>	■

5	Added Value Beyond Scope PAGE LIMIT: Maximum 1 x A4 pages	Identify risks which may affect the programme or costs, what impact they may have, and any mitigation.	
---	--	--	--

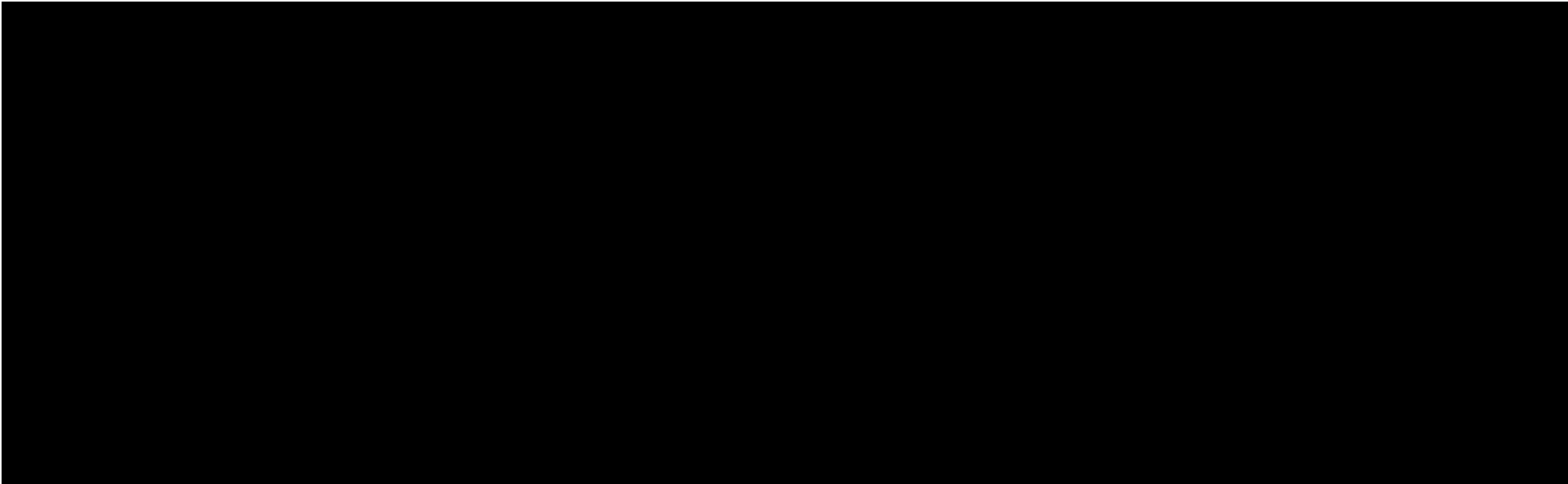
Price will account for [redacted] of the Overall Score. The lowest price will gain the maximum marks with other prices expressed as a proportion of the best score using the maths explained in the worked example below.

Criteria	Demonstrated by	Weighting
Price	Lump sum fee proposal	[redacted]

[Redacted]

[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

[Redacted]



Part 3

3.1 RESPONSE FORM

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

1. Terms and Conditions Acceptance

Please confirm acceptance of the Framework Agreement Terms and Conditions for appointment to the framework and for each individual instruction.

[Click here to select Option...](#)

2. Technical Merit of Proposal

3. Staff and other Resources

4. Geographic Coverage

5. Added Value Beyond Scope

