



Homes
England

Homes England Property and Financial Professional Services Framework 2022-2026

Further Competition Invitation to Tender (Stage 3)

London Strategic Projects Secondments

Date: 15/01/2024

ProContract Identification Number: DN692346



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 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 is the government's housing and regeneration agency, we believe affordable, quality homes in well-designed places are key to improving people's lives. Our mission is to make this happen by using our powers, expertise, land, capital and influence to bring both investment to communities and get more quality homes built.

The London Strategic Projects team, which is part of the wider Markets, Partners, Places Directorate. It is a multidisciplinary team with a remit to identify, lead on, and provide support to, large-scale, complex and innovative projects that require multiple interventions, cross-government and cross-discipline working. The team will work closely with Homes England colleagues, the GLA and other Government Departments to provide a bridge between policy, strategy and delivery. By forming a clear understanding of the strategic context and priorities surrounding a particular project at the pre-development stage; and by drawing on expertise and relationships, the team will develop robust, large-scale housing strategies that will drive market change and unlock delivery.

The large-scale nature of the projects means the majority of our schemes will need a Green Book Compliant Business Case that will need Homes England, MHCLG and HMT approval. This will require co-ordination of several stakeholders alongside the development knowledge and ability to bring forward projects.

2. Objectives

The London Strategic Projects Team are seeking to procure secondee(s) who will be embedded as part of the team, working with them to bring forward projects.

3. The Services

The secondment opportunities would likely be for twelve months with a possible extension of a further six months starting from 1st March 2024. We are looking for two development surveyors and these secondments can be at either of the following levels:

- Assistant Director and/or
- Director

To support the team, we are looking for two experienced development surveyors to provide strategic and expert advice in the field across a range of property related issues including large-scale infrastructure and development, delivery strategies, land assembly, delivery models and funding mechanisms. Familiarity with the business case process and experience in engaging with government departments on major strategic projects will also be valued.

The secondment(s) will be hybrid roles, based out of Homes England's London office, with a requirement to be in the office for a minimum of 50% of the time.

The secondees do not have to be all from one organisation, we may appoint secondees from multiple firms.

Proposed secondees must be employees of the firms providing them. Homes England will not accept persons working through personal service companies, in order to comply with Intermediaries Legislation. A Secondment Agreement will be entered into.

4. Key Accountabilities, Responsibilities & Skills

The secondees will be working on some of the largest and most complex development and regeneration projects in the country. In order to complete this role a number of relevant skills and accountabilities will be required from the secondees.

Key Accountabilities and Responsibilities

1. Using a problem-solving approach, work on a wide range of strategic, complex and innovative projects, adding value through expert commercial and development knowledge; Ensuring that Homes England utilises its full range of funding, products and skills to deliver a holistic package of intervention to places and markets.
2. Encourage and enable collaborative and multi-agency working, in partnership with other government departments and delivery bodies to ensure that strategically significant projects are delivered in an effective and timely way. This will include ensuring that barriers relating to the success of a project are addressed and that opportunities are exploited.

3. Support the Assistant Director of London Strategic Projects in developing innovative funding packages.
4. Use technical expertise, data and analysis effectively to guide, support and justify decisions. Write committee approval papers to seek permission for various strategic projects at various stages.
5. Commission consultants or Homes England's internal team to undertake research, analysis and provide other advice on issues that affect strategic projects, including contributing to a cross-Whitehall evidence base.
6. Provide briefings, deliver presentations and communicate the work of the team to internal and external audiences through a variety of means.

Key Skills

1. Experience of working on large-scale complex property and/or infrastructure projects and the ability to bring strategic knowledge to highly complex issues.
2. A deep understanding of the factors that drive strategic development, including experience of undertaking land assembly and delivery models (such as Development Corporations, Joint Ventures) etc.
3. Experience of analysing project / financial cashflows. Modelling experience / ability to build a cashflow with development knowledge would be an advantage, but it is not essential.
4. Knowledge of the economics, viability and funding of large-scale infrastructure to support large scale housing developments. Again experience of infrastructure / development funding would be an advantage, but it is not essential.
5. Experience of writing business cases / supporting organisations.
6. Experience of working as part of a team and working independently in fast moving and ambiguous environments where expectations and priorities are constantly evolving.
7. Excellent communication and stakeholder management skills, with a strong track record of delivering results through negotiation and collaboration.
8. The ability to coordinate a wide range of interests with multiple stakeholders (both public and private sector), on strategic property issues to deliver on Homes England priorities.

5. Management

i) Meeting Requirements:

Our aim is that the secondee(s) becomes embedded within the team, so that they develop an understanding of how the team and Homes England operates and are able to effectively bring forward projects. The secondee(s) will report to the Assistant Director of the London Strategic Projects team. At the time of joining Homes England, the secondees will be given one of the Heads of as a point of contact for day to day business needs.

The Secondee(s) will work within the wider London Strategic Projects team across a range of housing led real estate projects. We would expect them to attend project meetings, internal team meetings and where appropriate wider Homes England events to be agreed with the Assistant Director.

ii) Availability Requirements

The Secondee(s) will be required to be seconded through this instruction for 4 days per week minimum, commencing on the 1st March 2024. Within the first 4 weeks of the secondment a graduated build up of days per week would be acceptable, though notification of what this is in advance would be required.

6. Payment

Fees on a time charge basis will be invoiced monthly and paid one month in arrears on submission of a valid invoice.

7. 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.

8. 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.

9. 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.

Part 2 - Instructions for Submitting a Response

1. General

1.1 The Further Competition deadline is 18:00 on 05/02/2024 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 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 individual instruction 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. Where a supplier is proposing more than one secondee, a response form for each proposed secondee will be required to be completed and returned.

3. Pricing

3.1 The pricing approach for this Further Competition is on a time charge basis. The time charge rates will have regard to the General Services Framework Rates on the Homes England Property and Financial Professional Services Framework 2022-2026, which represent the maximum rate returnable at each grade. Fees on a time charge basis will be invoiced monthly and paid one month in arrears on submission of a valid invoice.

Proposed Secondee Name	Proposed Secondee Grade	Price per Day	Price Relationship to Framework Pricing
[insert name]	[insert grade] Director or Assistant Director	[insert price]	[insert relationship]

3.2 Within the Framework Pricing, Director refers to “Director Level Consultant, or Associate Partner, or equivalent” and Associate Director to “Principal Consultant /Managing Consultant, or equivalent”.

3.3 The list of activities in the Invitation to Tender 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.

3.4 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 Each Seconded proposed by an organisation will be evaluated on an individual basis. The two highest scoring individual seconded responses submitted for this further competition will be successful. The successful secondees do not have to be all from one organisation and can be at either Director or Assistant Director level.

4.2 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.

4.3 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.

4.4 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. Interviews may be used in the evaluation stage but only in exceptional circumstances and for clarification purposes only. Scoring may be reduced to reflect the information provided during the interview.

5. Documents to be Returned

Suppliers are expected to provide the following information in response to this

Further Competition ITT:

- Completed Response Form including Pricing Section

6.EVALUATION CRITERIA

Quality will account for 75% 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	Weighting
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>Pass/Fail</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>Proposed Secondees Skills</p> <p>Maximum page limit = 4 A4 pages per secondee</p>	<p>Please provide a CV for the proposed secondees to cover the roles as listed under the Services section that sets out:</p> <ul style="list-style-type: none"> i) Their experience relating to the areas outline in the brief. ii) How their key skills align with those outlined in the brief e.g. cashflow modelling / business cases. iii) Any additional skills and experience that are relevant, but that are not mentioned in the brief. 	30%
3	<p>Proposed Secondees Approach</p> <p>Maximum page limit = 2 A4 pages per secondee</p>	<p>For each proposed secondee, how will the individual engage with partners and stakeholders to scope the project and bring it to fruition</p> <p>This response must be supported by information on 2 large-scale strategic development and/or infrastructure projects examples they have worked on, including information on:</p> <ul style="list-style-type: none"> - What was the project? - What were their role & responsibilities? 	25%

		<ul style="list-style-type: none"> - Were the outputs & outcomes they were responsible for? - Who were the other parties involved? - What impact did their involvement have? - Were public sector interventions required? - Was the project approved / delivered? - How was the impact of the project evaluated? - What lessons would they bring to this role? 	
4	<p>Proposed Secondees Availability</p> <p>Maximum page limit = 1 A4 page per secondee</p>	<p>In relation to the availability requirements set out in Part 1, Section 5 (ii). Please state when the proposed secondee would be available to start and how many days they would be available to work at Homes England and whether any graduated build up of days would be needed.</p> <p>Please provide their location / office</p>	15%
5	<p>Additional Value Add</p> <p>Maximum page limit = 2 A4 pages per secondee</p>	<p>Please provide any information on any value add that each secondee and your company would bring to our team through the secondment roles.</p>	5%

Price will account for 25% 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 Table in Section 3.1 for each proposed Secondee	25%

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
Submission Response A	1	PASS	N/A	N/A	PASS	49
	2	3	30%	6	18	
	3	4	25%	5	20	
	4	3	15%	3	9	
	5	2	5%	1	2	
Submission Response B	1	PASS	N/A	N/A	PASS	65
	2	5	30%	6	30	
	3	4	25%	5	20	
	4	4	15%	3	12	
	5	3	5%	1	3	
Submission Response C	1	PASS	N/A	N/A	PASS	n/a (fail)*
	2	2	30%	6	12	
	3	1	25%	5	n/a	
	4	2	15%	3	6	
	5	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 25)
Supplier A	350	$350/350 = 100\%$	$100\% * 25 = 25$
Supplier B	700	$350/700 = 50\%$	$50\% * 25 = 12.5$
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	49	25	74	2
Supplier B	65	12.5	77.5	1
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]
Individuals Name:	[insert]
Date:	[insert]

Quality

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. Proposed Secondees Skills

3. Proposed Secondees Approach

4. Proposed Secondees Availability

5. Additional Value Add

Proposed Secondee Name	Proposed Secondee Grade	Price per Day	Price Relationship to Framework Pricing
[insert name]	[insert grade]	[insert price]	[insert relationship]

Document Information	
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Version	Date	Summary of changes	Editor
1.0	31/07/2023	New branding	Commercial Officer
1.1	07/11/2023	T&Cs wording inserted	Senior Commercial Manager