



# Property and Financial Professional Services Framework

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

**Carr Lodge, Phase 3, Doncaster, DN4**

**Issue Date: 12/06/2023**

**ProContract Identification Number: DN674174**



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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

Carr Lodge is a 94ha mixed use site owned by Homes England and situated to the south of Doncaster and north west of the M18/A6182 junction. The whole site originally received outline planning consent in 2012 (planning application ref: 10/00312/OUTA) which sought to include a maximum 1,600 dwellings and associated commercial and community uses.

The developable area is 57ha split over three development phases:

- Phase 1 – 12ha and a total of 353 homes
- Phase 2 – 13ha and a total of 460 homes
- Phase 3 – 32 ha and yet to be delivered

Homes England is seeking to appoint a member of the Property and Financial Professional Services Framework to enable the disposal of the site 'Phase 3 Carr Lodge' within Homes England's requirements.

The site is outlined on the plan below and is known as 'Phase 3 Carr Lodge'.

Phase 1 of this development edged pink has already been completed by Strata Homes and provides 353 homes.

In September 2018. Keepmoat Homes submitted an application in respect of Phase 2 (split between 2A and 2B and edged in blue on the plan below). The application was for 460 homes comprising 2 bed apartments and 2, 3 and 4 bed dwellings with associated roads, footpaths and landscaping (18/02284/FULM). This application was approved in August 2019 and Phase 2 is now substantially under construction.

Phase 3 is proposed to provide up to 385 homes and land for a local centre. There will be substantial public open space provided which will include a playing field, play areas and a dedicated space for wildlife. These facilities can be enjoyed by all residents and visitors of Carr Lodge.

The allocation states that the Carr Lodge Design Code SPD exists for this site, and in order to coordinate the delivery of community facilities, local centre, parks and areas of public open space a refreshed masterplan and delivery strategy for the remaining phases of development needed to be developed in consultation with the local community and Council and approved by the Local Planning Authority. In order to provide certainty to developers, Homes England will secure an outline consent ahead of marketing the site. The planning application is in an advanced stage and is due to be submitted in July 2023.



## 2. Objectives

Homes England's primary objective is to enter into an Agreement for Lease by December 2024 with a developer(s) who will then obtain Reserved Matters planning approval and deliver the permitted development at Carr Lodge. At this stage the phasing and disposal strategy is not fixed and this will be a key part of the initial advice sought from the property agent supported with feedback from the market.

Homes England will need to secure best value for the site while also seeking to deliver other policy objectives such as providing affordable housing, delivering good design in compliance with Building for Healthy Lives, pace and Modern Methods of Construction (MMC).

The site will be marketed via Homes England's Dynamic Purchasing System (DPS) with support from the appointed Marketing Agent. DPS is an open framework that developers can join at any time, allowing them to take advantage of Homes England's land opportunities as they arise.

The appointed Marketing Agent will be required to actively engage with developers early on in the process to help raise awareness of the opportunity prior to formal commencement of the developer procurement. This will involve engagement with active local developers who have the ability and capacity to deliver a residential led development on this site of this scale. The intention is to encourage them to apply to join the DPS in sufficient time to be eligible to participate in the Call for Completion / Expression of Interest (EOI) process

The site is to be sold via Homes England's standard Agreement for Lease and Building Lease structure.

## 3. The Services

To support the disposal, Homes England is seeking to appoint a member of the Property Professional Services Framework to assist in the procurement of a developer to enable the disposal of the site with Homes England's requirements.

The scope of services will involve:

1. Assessing viability throughout the outline planning application process to ensure s106 obligations are deliverable.
2. Submitting a viability application to Doncaster Council if required.
3. Market engagement – conduct an informal soft-market testing exercise with all interested parties to test the tender opportunity and delivery and phasing options. This will be led by the appointed Marketing Agent but Homes England project team would be actively involved in the process. This stage will include the identification of interested parties not already registered with Homes England's DPS system and signposting them towards the registration process.
4. Marketing and Disposal strategy – based on market intelligence and analysis of the Soft Market Testing, prepare a marketing and disposal strategy for the site, including market demand and pace of delivery assessment.
5. Call for Competition / Expression of Interest – to review the formal EOI brief prepared by Homes England. The EOI will be released via ProContract by Homes England to DPS members. By this time, any new entrants resulting from the Market Engagement will be registered. This stage will determine which members of the DPOS are interested in bidding for the site and confirm their ability to deliver the policy objectives for it.
6. Call for Competition – to review the Invitation to Tender (ITT) prepared by Homes England. Again, this will be released via ProContract by Homes England to DPS members.
7. Tender Evaluations & Clarifications – to assist Homes England in assessing the Price elements (i.e. Price and Cost Robustness) of the tender submissions. Non-Price elements (i.e. Design, MMC and Technical Risk) will be scored either internally by Homes England and/or independently by multi-disciplinary project team members. Once the tenders have been evaluated and the score moderated the appointed Marketing Agency will provide a Tender Evaluation Report which shall accompany the Homes England Gateway 4(G4) Approval paper seeking approval to dispose of the site.
8. Mid and Post tender clarifications will be managed by Homes England via ProContract but the appointed Marketing Agent may be called upon when required to assist and advise on the responses provided.

9. To provide a Franking Valuation (see Homes England Briefing Note Franking Valuations for Agents) which shall accompany the Homes England G4 Approval paper.
10. Any reasonable advice or support required as part of the marketing and preferred bidder selection process.

Please note that ProContract will be managed by Homes England and the Marketing Agent will be provided access and will be able to access all information via this portal. A full suite of technical information will be made available prior to ITT.

## 4. Key Deliverables

Homes England wishes to appoint an Agent to act in an advisory and marketing capacity in order to achieve the disposal of the subject site. Key elements of this commission are to:

- Assess viability throughout the outline planning application process
- Submit a formal viability statement to Doncaster Council if required and respond to queries
- Prepare marketing particulars for early engagement with potential bidders (Homes England to supply relevant detail)
- Undertake the marketing of upcoming tender opportunity in the market and with DPS members
- Engage with developers to test demand for the site and formulate a marketing and disposals strategy
- Advise on the most appropriate phasing strategy to facilitate delivery of Homes England's objectives
- Provide market demand assessment and advice relating to the various delivery options to inform the disposal strategy taking account of the local market conditions
- Evaluate tender submissions and assist with mid and post tender clarifications
- Attend meetings when required to review scoring of tenders and produce a Tender Evaluation Report
- Provide a Franking Valuation Report

## 5. Site Information

The following documents are available to download via procontract:

- Red line planning boundary
- Indicative masterplan

## 6. Indicative Programme

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

Key Delivery Milestones	Anticipated Date
Appointment	July 2023
Planning application submission	July 2023
Produce viability statement	August 2023
SMT	September 2023
Formal EOI	October 2023
S106 and Decision Notice	February 2024
ITT	February 2024
Tender Evaluation	June 2024
G4 Approval to appoint a developer	August 2024
Agreement for Lease	December 2024

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## 7. Management

The lead contact in relation to this commission is Lucy Eyeington – Senior Development Manager.

The team working on this disposal also includes:

Matt Ridge (Planning and Enabling Manager)

### Meeting Requirements:

- Start-up meeting

A commission start up meeting will be held upon appointment.

- Review meetings



Regular review / update meetings will be required through the planning, marketing and disposal process and will be agreed as the commission progresses.

- **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. Payment

Fees will be paid upon completion of individual tasks.

## 9. Limitation of Liability (if appropriate)

Consultant liability levels in relation to this instruction shall be as set out in the Framework Contract.

## 10. 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.

## 11. 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.

## 12. 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 **1pm on Friday 7<sup>th</sup> July** 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

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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 a lump sum fixed fee.

3.3 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.

3.4 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 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
- Completed Resource and Pricing Schedule
- Supporting CV's for staff proposed to undertake this commission (no more than 2 pages each)



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## 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
1	<p><b>Technical Merit of Proposal</b></p> <p>Provide a statement to explain how this commission will be undertaken with supporting evidence, in particular how you can add value to the process.</p>	<p>Statement outlining method and approach explaining how the commission will be undertaken</p> <p>Schedule of services to be delivered</p> <p>Information on other Supplier input that may be required</p> <p>Identification of other information that may be required</p> <p>Where relevant identification of areas of innovation</p> <p>Where appropriate identify the potential impact of external influences</p>	15%

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	<p>PAGE LIMIT: Maximum 2 A4 pages, 11-point Corbel font</p>	<p>and stakeholders</p> <p>Areas where value engineering could be considered to achieve best value.</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>	
2	<p><b>Staff and other Resources</b></p> <p>Bidders are asked to identify who within their team will undertake the commission and confirm why have they been chosen for this project.</p> <p>The chosen Team should cover the Services that are expected as part of this commission.</p> <p>A clear understanding of the expertise and experience of the Bidder's team will be beneficial.</p> <p>LIMIT: No more than 4 sides of A4, font size min 10 and no more than 2 pages per CV</p>	<p>Who will undertake the commission and why have they been chosen?</p> <p>Who will be responsible for reporting to the Client?</p> <p>Who will manage the team?</p> <p>Identify key members of staff and allocation to the required services</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> <p>- What communication strategy will be adopted to ensure the Client is fully aware of progress?</p> <ul style="list-style-type: none"> <li>• CVs for key members of staff should be provided, highlighting any relevant examples, where applicable.</li> </ul>	5%
3	<p><b>Market Engagement</b></p> <p>Describe how you will market this opportunity and how you will engage with the market and support new entrants to the DPS as well as consulting on delivery</p>	<p>Information and evidence to support knowledge and experience of the local property market</p> <ul style="list-style-type: none"> <li>• Examples of related experience that will add value to this commission, supported by relevant examples where applicable</li> </ul>	10%



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	options to recommend a delivery strategy. PAGE LIMIT: Maximum 2 A4 pages, 11-point Corbel font		
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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	15%	3	9	19
	2	4	5%	1	4	
	3	3	10%	2	6	
Supplier B	1	5	15%	3	15	27
	2	4	5%	1	4	

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	3	4	10%	2	8	
Supplier C	1	2	15%	3	6	n/a (fail)*
	2	1	5%	1	n/a	
	3	2	10%	2	4	

\* 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	19	70	89	1
Supplier B	27	50	77	2
Supplier C	n/a	n/a	n/a	n/a

Part 3

3.1 RESPONSE FORM

Framework:	Property and Financial Professional Services Framework
Project Title:	Carr Lodge, Phase 3, DN4
ProContract Identification Number:	DN674174
Supplier:	
Date:	

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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

20

## 3. Market Engagement

### 3.2 RESOURCE AND PRICING SCHEDULE

Excel spreadsheet to be embedded by Supplier in response.