



Homes  
England

# **Property and Financial Professional Services Framework 2022-26 (Lot 1)**

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

## **Marton Estate, Old House Lane, Fylde – Property Agent Services**

Issue Date: 19 June 2023

ProContract Identification Number: DN675195



## 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 8 (Evaluation Criteria) using the Response Form and to return the Response Form and Resource and Pricing Schedule in Part 3 with your tender.

This Further Competition ITT is divided into 3 parts:

### Part 1 – Commission Requirement

- Details the commission requirements.
- Details additional terms and conditions for the Further Competition. The successful Supplier will be subject to both the terms and conditions of this Further Competition and the Framework Contract. Unless otherwise defined in these instructions, terms used shall have the meaning given to them in the Framework Contract.

### Part 2 – Instructions for Submitting a Response

- Contains important information and instructions on preparing and submitting a tender response. Please read these instructions carefully prior to submitting your tender response.
- Outlines the evaluation criteria which will be used for assessment. It is important that Suppliers familiarise themselves with the criteria and ensure they are considered when compiling their tender response.

### Part 3 – Standard Forms

- Contains the standard forms required to be completed and returned by the Supplier when submitting a tender response.

## Part 1 - Commission Requirements

### 1. Commission background

Homes England are the Government's Housing and Regeneration Agency. We will drive regeneration and housing delivery to create high-quality homes and thriving places. This will support greater social justice, the levelling up of communities across England and the creation of places people are proud to call home.

We welcome partners who share our ambition to challenge traditional norms and build better homes faster.

Homes England acquired land for development on the southern edge of Blackpool at Marton Estate, Old House Lane, Fylde in March 2023. It is our intention to undertake a range of de-risking activities in advance of marketing the site for residential development. The de-risking activities will include securing a market-facing outline planning consent for circa 265 homes and preparing a robust technical pack.

The primary purpose of this commission is to provide property agent services to support Homes England's North West Disposals team to:

- Engage with the residential development market at an early stage to inform the planning, de-risking and disposal strategies
- Support the implementation of a disposal strategy which is expected to comprise the competitive procurement of a development partner via the Delivery Partner Dynamic Purchasing System (the DPS) to secure a wide range of policy objectives, including design quality, pace of delivery, modern methods of construction and value for money.

The appointed agent will support the Disposal Team in these activities but will be part of and will engage with the wider Homes England project team which will comprise:

- Homes England's Planning & Enabling Team who will be leading on the de-risking and planning activities
- Pell Frischmann who are appointed by Homes England's Planning & Enabling Team to provide a range of multi-disciplinary services to secure a deliverable and well-designed outline planning consent and technical de-risking activities to provide an attractive site to the market.
- The Property Advisor to be appointed by the Planning & Enabling Team to provide detailed property and valuation advice in relation to wide range of activities which are likely to include masterplanning, viability, S106, rights, wayleaves and easements, and potentially further acquisitions. This Property Advisor will be procured via a separate Further Competition in similar timescales. If invited, bidders are welcome to bid for both opportunities and, if successful, undertake both commissions.
- Other Homes England colleagues and advisors as required.

## 2. The Site

The site is located to the south east of Blackpool and extends to 11.09 hectares and predominantly located to the south of Old House Lane in a mixed residential and commercial / industrial setting to the south-west of junction 4 of the M55 and is on the western boundary of the Fylde borough.

The previous landowner secured outline planning consent (ref 15/0114) for mixed use development and marketed the site for development. The marketing exercise did not result in the disposal to a developer / housebuilder. The land acquired by Homes England excludes the employment land so is expected to be developed for residential uses only, subject to planning consent.

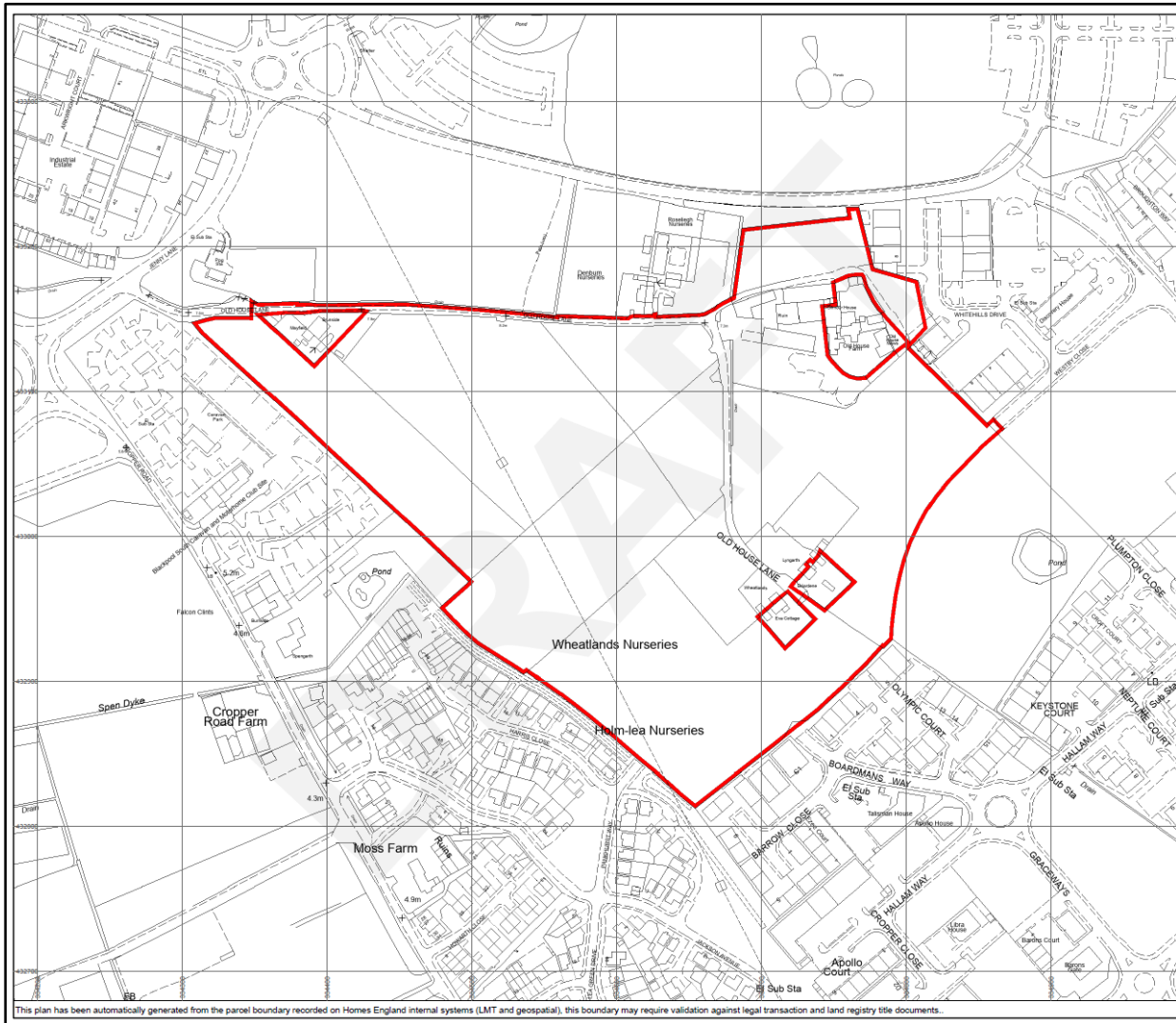
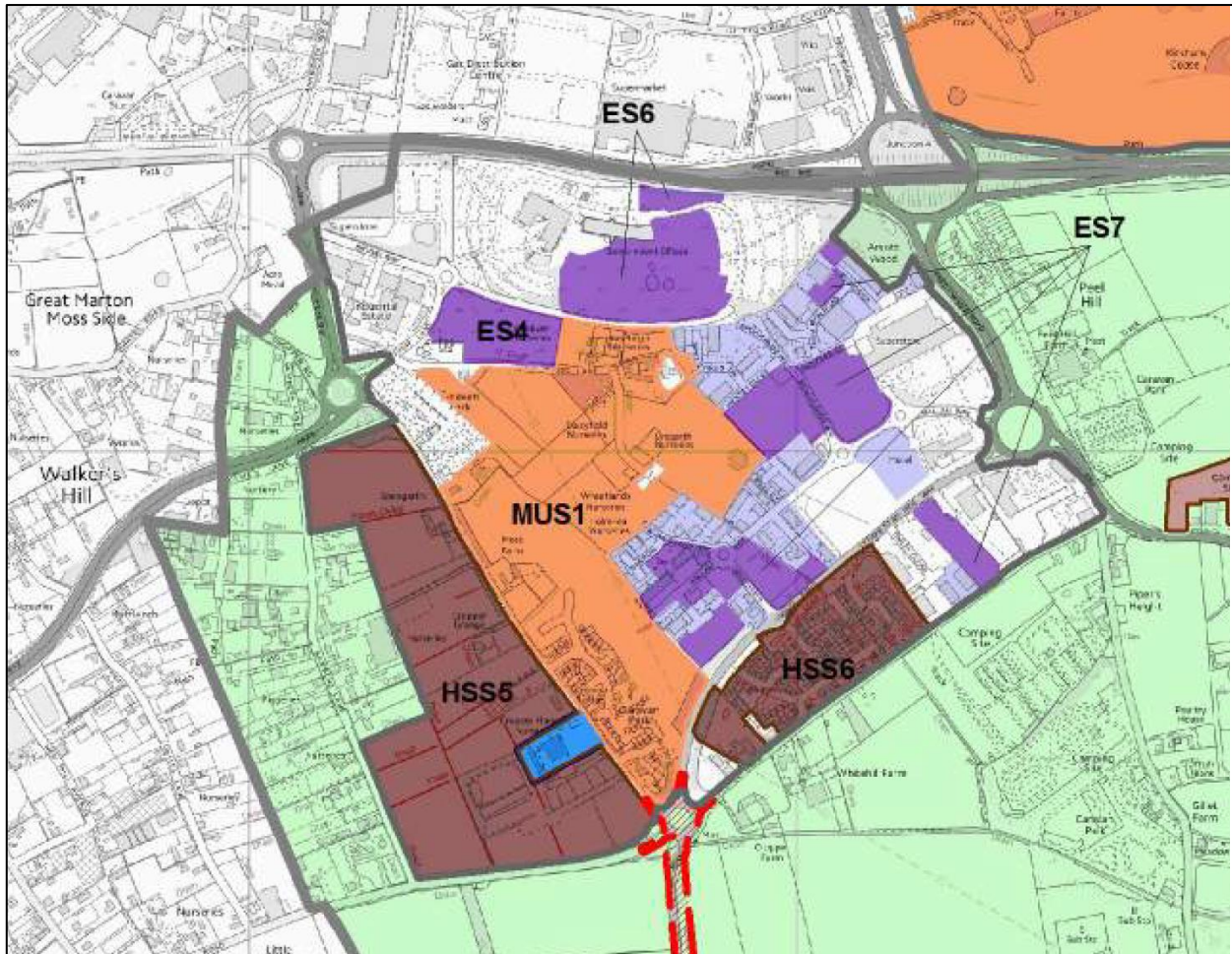


Figure 1 - Site Plan

### Planning Context

The Marton Estate site is located within the Fylde Local Authority area. It is allocated for mixed use development (under Allocation Reference MUS1) under Strategic Policy GD6 "Promoting Mixed Use Development" of the Fylde Local Plan to 2032 (incorporating partial review) adopted in 2021. An extract of the Local Plan Proposals map is provided below.





## Land Ownership and Property Issues

While Homes England owns the vast majority of land required to facilitate the comprehensive development of its land at Marton Estate, there are notable instances of third-party land and unregistered land for which a risk mitigation strategy will be required.

### Old House Lane (not an adopted highway)

Old House Lane is not a highway maintainable at public expense. It is understood that there are various rights of way over Old House Lane and various rights of drainage. There is also a portion of Old House Lane which is not within Homes England's ownership. A caution has been registered against first registration.

There are 8 properties which use the track as access to their properties (Mayfield, Brunside, Gilmour House, Old House Farm, Roseleigh, Denburn, Eva Cottage and Briar Dene). Whilst the access for the residential development proposal is expected to be taken from Westby Close, further work will be undertaken to understand the existing landowners' rights and their implications.

### Eva Cottage and Briar Dene

There are two semi-detached residential properties and associated curtilage, Eva Cottage and Briar Dene, which sit outside of Homes England's ownership within the centre of the site. These properties are attached to two semi-detached properties which are within Homes England's ownership (Wheatlands Hill and Lyngarth).

The properties' only vehicular access is via Old House Lane and it is understood that there are rights of way and of drainage along this north-south route of Old House Lane.

## 3. Objectives of Commission

Homes England wish to appoint a property agent to provide support to Homes England's North West Disposals Team at two key stages of the project:

### **Stage 1 – Market engagement and commercial advice to inform strategy.**

Taking account of the site's size, location, known constraints, local market and previous exposure to the market and other relevant factors, Homes England is keen to understand developer appetite for the site and views on proposed de-risking activities and disposal strategy at an early stage. This stage should be undertaken quickly to gauge the market and inform subsequent activities by the wider project team. Engagement with a number of potential developers will be required, with potential involvement of Homes England at any meetings.

Following Stage 1, there is expected to be a period when the planning and de-risking activities are progressed by the wider team and the appointed agent's involvement will be minimal.

### **Stage 2 – Disposal - the procurement of a development partner via the Delivery Partner Dynamic Purchasing System (DPS).**

Once the de-risking and planning activities have reached a sufficiently advanced stage, the appointed agent will support the Disposals Team to procure a development partner via the Delivery Partner Dynamic Purchasing System (DPS). This stage is currently forecast to commence in early 2024 but timing will depend on progress with other activities, Homes England business needs and also the advice provided at Stage 1.

The DPS is an open framework so interested developers who have not already done so will have the opportunity to become a member of the DPS before the launch of the procurement.

Stage 2 will form the main part of this commission and will comprise:

1. Undertaking soft-market testing with potential development partners to determine the appropriate policy objectives to be secured through the procurement and inform the detail of the disposal strategy / development of tender evaluation criteria. This will include the preparation of an electronic / pdf site brochure, a questionnaire and a small number of interviews with a selection of potential development partners.
2. Based on market intelligence and analysis of soft market testing, prepare report to support approval of disposal strategy / tender evaluation criteria
3. Assistance with preparation of tender documentation and management of tender process, including clarifications and mid-tender meetings (if required).
4. Evaluation of tenders received, support during tender clarifications and provision of tender report to support approval to dispose to preferred bidder.
5. Franking valuation required to support approval.

## Key Deliverables

The key deliverables at each stage will be:

### Stage 1

- Report summarising findings and recommendations arising from pre-market engagement with potential developers and together with agent’s advice on market and approach to de-risking and disposal.

### Stage 2

- Agreed Soft Market Testing Questionnaire to be issued to DPS members and others, supplemented by interviews (with Homes England) with 5 potential development partners
- Report summarising recommended disposal strategy, analysis of soft market testing and market advice to support approval of disposal strategy and tender evaluation criteria (G3).
- Tender documentation (EOI and tender stage)
- Support with tendering exercise, including assistance with bidder clarifications and attendance at mid-tender meetings
- Evaluation of tenders
- Tender report to support approval (G4) of preferred bidder (and under-bidder if appropriate)
- Franking Valuation Report that meets Homes England’s requirements

## Indicative Programme

These dates are indicative only to illustrate the period of the commission envisaged. Suppliers should note the indicative programme dates when preparing their Delivery Methodology in the Response Form.

Key Delivery Milestones	Anticipated Date
Appointment of Property Agent	June 2023
Completion of Stage 1	July / Aug 2023
Commencement of Stage 2 (Soft Market Testing)	Spring 2024
Publication of ITT	Summer 2024
Conditional Agreement	Late 2024 / early 2025

## Management

The commission will be managed on a day-to-day basis for Homes England by a Development Manager within the North West Disposals team. The appointed consultant should also identify a single or primary point of contact for the project.

## Meeting Requirements:

An inception meeting will be held via Teams with the appointed consultant following confirmation of appointment. Project meetings will be held via Teams when necessary.

## 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.

## 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.

## Payment

It is generally expected that invoices will be raised for completed works or following receipt of a completed output.

## Conflict of Interest



## **The Housing and Regeneration Agency**

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.

### **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

Please refer to the ProContract Portal Advert for the Further Competition deadline. 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).

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.

**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.**

The Supplier must 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.

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.

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 8 (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.

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.

# The Housing and Regeneration Agency

Tender responses must be written in English and both Microsoft and PDF versions of tender documents must be submitted.

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.

Homes England reserves the right to cancel this Further Competition process at any time.

## 2. Quality

A Response Form template has been provided in Part 3 to respond to the Quality questions detailed in Section 8. The Response Form must be **completed and returned** as part of the tender response.

Suppliers must provide information on proposed staff in the Response Form and Resource and Pricing Schedule provided in Part 3. 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

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.

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.

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

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 8 (Evaluation Criteria) below and the scoring approach is also detailed (Worked Example). Scores will be rounded to two decimal places.

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.

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:

## The Housing and Regeneration Agency

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

# The Housing and Regeneration Agency

## 6. Evaluation criteria

### Scoring method

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.

# The Housing and Regeneration Agency

## Quality Questions

Number	Criteria	Demonstrated by	Weighting
1	<p><b>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><b>PAGE LIMIT:</b> Maximum 3 pages A4 pages, 11-point font</p>	<ul style="list-style-type: none"> <li>• Statement outlining method and approach explaining how the commission will be undertaken</li> <li>• Schedule of services to be delivered</li> <li>• Information on input that may be required from Homes England</li> <li>• Identification of other information that may be required</li> <li>• Where relevant identification of areas of innovation</li> <li>• Where appropriate identify the potential impact of external influences and stakeholders</li> <li>• Other commentary on the brief</li> </ul>	10%
2	<p><b>Market Engagement</b></p> <p>Describe how you will engage effectively with the local residential development market in Fylde Coast / West Lancashire area to provide advice to Homes England and how the marketing will assist in</p>	<ul style="list-style-type: none"> <li>• Statement setting out understanding of and approach to the local residential land market</li> <li>• Information and evidence to support knowledge and experience of the local property market</li> </ul>	10%



## The Housing and Regeneration Agency

	<p>delivering the project objectives.</p> <p><b>PAGE LIMIT:</b> Maximum 1 page A4 pages, 11-point font</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>	
3	<p><b>Staff and other Resources</b></p> <p>Describe who will undertake this commission and the proportion of each member of team's time that they will they devote to it.</p> <p><b>PAGE LIMIT:</b> Maximum 1page A4 pages, 11-point font</p>	<ul style="list-style-type: none"> <li>• Who will undertake the commission?</li> <li>• Who will be responsible for reporting to the Client?</li> <li>• Who will manage the team?</li> <li>• Identify key members of staff and allocation to the required services</li> <li>• How much time will they devote to it?</li> <li>• Resourcing information provided in a Resource and Pricing Schedule</li> <li>• Supported by CVs for key members of staff</li> </ul>	10%

Price will account **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%

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### Worked example of weighting and scoring

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	10%	2	6	22
	2	4	10%	2	8	
	3	4	10%	2	8	
Supplier B	1	5	10%	2	10	26
	2	4	10%	2	8	
	3	4	10%	2	8	
Supplier C	1	2	10%	2	4	N/A (fail)*
	2	1	10%	2	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

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Worked example of Overall Score and Ranking:

Bidder	Total Quality Score	Price Score	Total Score	Ranked Position
Supplier A	22	70	92	1
Supplier B	26	35	61	2
Supplier C	N/A	N/A	N/A	N/A

## Part 3 – Response Form

<b>Framework:</b>	Property and Financial Professional Services Framework 2022-2026 (Lot 1)
<b>Project Title:</b>	Marton Estate – Property Agent Services
<b>ProContract Identification Number:</b>	DN675195
<b>Supplier:</b>	
<b>Date:</b>	

To enable Homes England to evaluate your tender, we require Suppliers to respond to the quality questions 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.

The questions should be responded to using the following headings:

- Proposal
- Proposed Staff
- Management arrangements

### Resource and Pricing Schedule

The excel spreadsheet at Appendix 1 is to be included by the Supplier in response to this tender.