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| Property & Financial Services Framework Lot 1 |

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| Further Competition Invitation to Tender (Stage 1 Under FTS Threshold)   |  | | --- | | **Middleway, Digbeth, Birmingham – Property Consultant**  **Issue Date: 8 December 2023**  **ProContract Identification Number: DN702897** | |

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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](#_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 is playing a significant role in co-ordinating the regeneration of Digbeth which forms part of our wider vision that is shared with the City Council for the levelling up of the whole of east Birmingham.

The Middleway site in Digbeth, Birmingham presents an opportunity to deliver Homes England’s mission and objectives and supports Birmingham City Council’s vision for Digbeth. Through working with the local authority and local community to shape our vision for the site, we will design and deliver a high-quality housing-led mixed-use scheme that helps drive regeneration and create a thriving local area.

The Homes England Middleway site comprises 1.12ha of brownfield land on the eastern edge of Digbeth, Birmingham. The site fronts onto Lawley Middleway along the extent of the eastern boundary. The raised railway tracks into the city pass along the northern boundary of the site and the River Rea runs along the northwest corner for a short stretch before re-entering a culvert under Montague Street. The site is bound by Montague Street to the west and the former Mercedes garage to the south, which has temporary consent for a banqueting and events venue until 17 March 2028 (reference 2022/09282/PA).

The site was assembled from two major landownerships. For the area north of Belmont Passage (previously occupied by McGowan’s Grab and Tipper Hire), vacant possession of a cleared and remediated site is to be secured in Q4 23/24; with the southern portion of the site currently under lease to a Volkswagen car dealership (VW) with vacant possession expected in June 2025.



Please note that, in the event that Homes England acquires small adjacent land parcels, we reserve the right to include it within the existing red line boundary. In this event, we do not consider the acquisitions to materially impact the scope of the commission.

The Middleway site occupies a highly sustainable location in Digbeth, central Birmingham. It is within walking distance of three train stations, including the new Curzon Street HS2 station (450m) and Birmingham New Street (1.4km), Birmingham City Centre (1.2km), multiple bus stops and the extended route for the metro all of which connect the site to Central Birmingham and beyond as shown in the map below.

An aerial view of a city

Description automatically generated

It should be noted that Homes England owns approximately 6 ha of land to the west of the site on the opposite side of Montague Street. This comprises the former Birmingham City Council waste management depot, with a current interim use for film studios, as well as a cleared site abutting the railway line. Beyond that, the Banana Warehouse site is being brought forward as the new filming location for MasterChef whilst proposals are emerging for the wider scheme at Fazeley Street. For clarity, these sites will be brought forward independently to this commission, but the relationship between them and the Middleway site must be well defined.

**Objectives**

The project’s key objectives are:

* + To develop an illustrative residential-led mixed-use masterplan that is market facing and which is consistent with local planning policy, optimises the delivery of homes on the site and is commercially viable.
  + To drive high standards of design quality across the site, and to consider the relationship with adjoining land uses and development opportunities.
  + To receive buy-in and support from the Local Planning Authority and other key stakeholders to minimise risk.

Whilst this site must come forward on its own, the wider context must be considered, including the relationship and connection with adjoining land uses and development opportunities, particularly Homes England’s landholdings at Warwick Bar and the vision that comes forward there.

At a high level, the outputs and outcomes for the site are:

1. Homes England are committed to delivering 400 homes at this site but have scope to increase this to up to 500 homes through viability and design analysis. Achieving this density is likely including a tall building(s)
2. 35% affordable housing
3. Approximately 2500 sq. m. employment generating floor space
4. Improved human scale connectivity, particularly the site’s permeability north-south and east-west
5. Exploring the opportunity for stopping up Montague Street.
6. Support the Council’s aspirations for an improved environment around Lawley and Watery Lane Middleway including improvements to noise and air quality
7. Improved green infrastructure with a particular focus on the aspect of the River Rea
8. 10% Biodiversity net gain
9. An illustrative Masterplan which achieves Building for Healthy Life accreditation

Delivering a mixed-use development at this site aligns with Birmingham City Council's aspirations for this area of Digbeth as set out in the adopted Local Plan and the Our Future City: ‘Draft Central Birmingham Framework 2040’. In committing to deliver a mixed-use development, the site will seek to maximise the yield of new homes and will compliment Digbeth's economic and community activity by providing additional square footage to bolster accessible amenity provision in the area.

The housing provision on site will deliver policy compliant 35% affordable housing and will balance tenures and types that respect local housing need with the nature of the site as a gateway location along rail and road links.

**Disposal Strategy**

Homes England’s Land Disposal Policy requires that sites of this magnitude and capacity are offered to members of the Agency’s DPS utilising the building lease and following the Agency’s DPS disposal protocols. The building lease incorporates a number of Homes England’s policy requirements, namely:

* a requirement to achieve an accelerated rate of construction above market rates currently being delivered.
* a requirement to support the use of Modern Methods of Construction (MMC) within schemes to accelerate construction.
* a consideration of phased payments to improve cashflow and allow developers to focus capital on housing delivery.
* a consideration to incorporate Homes England’s requirements in relation to Place Making including requirements relating to Building for a Healthy Life 12 (BfHL12).

The tendering process and disposal of Middleway will therefore need to consider the above requirements.

1. **The Services**

Based on the above, Homes England will require the appointed agent to undertake the key services listed below. This is not an exhaustive list, and the consultant is requested to make any recommendations for amendments or additions in their return.

**Stage 1**

* Identify a lead Consultant and maintain this throughout the commission;
* Undertake a property market analysis by review of a residential mixed use scheme in terms of supply and demand at sub-regional and local levels to advise on in terms of commercial return;
* Property advice and input into the masterplanning process including viability testing of three illustrative masterplanning options;
* Undertake soft market testing;
* Provide advice and support to Home England’s core Project team throughout the outline planning application process and provide economic viability assessments on the S106 requirements if necessary;
* Establish Disposal Strategy including EOI & Sifting Brief stages;
* Preparation of the Tender Pack for issue to bidders at the Invitation to Tender (ITT) stage. Detailed bids will need to respond to Homes England’s standard ITT requirements, namely (but not limited to):

1. The prepared master plan and indicative layout for the site;
2. Planning & Disposal Brief setting out the planning background to the site and the proposed development, identifying the key planning & site issues, requirements of planning conditions and s.106 payments, triggers & timings together with accompanying planning documents and drawings;
3. Statement on Design Details, including Building for a Healthy Life compliance. To be supported by illustrative material including key street scenes, sketches, etc. The expectation for The Site is that the bidders will score 8 ‘greens’ against the Building for a Healthy Life criteria;
4. Utilities, Drainage and Services Proposals and details of connections to existing or new services and utilities;
5. A planning strategy for the reserved matters application, public consultation & stakeholder engagement, and s.106/discharge of Conditions;
6. A phasing and delivery plan;
7. Financial Offer;
8. Any other additional and mandatory non-price requirements that may emerge as part of Homes England’s standardised approach to disposals between now and the preparation of the ITT.

**Stage 2**

* Produce a shortlisting document and support in shortlisting bidders;
* Manage the detailed bids stage of the process including responding to bidder queries and managing the process on the Homes England e-tendering system for a DPS disposal;
* Liaise with bidders during the marketing stage, undertaking a clarification session with interested developers and managing requests for site visits, preparation of responses to queries and provision of any supplemental information as may be required. To also receive indicative layout proposals prior to formal submission with the opportunity to discuss this at the clarification sessions as mentioned above;
* Develop in collaboration with Homes England the scoring criteria;
* Support/advise Homes England in the evaluation & assessment of ITT returns by undertaking a detailed analysis & appraisal of the financial returns including cost & value assumptions.
* If required, arrange & lead developer clarification interviews following submission of ITT returns and establish interview & clarification questions;
* Ensure robust sign off processes for assessment, moderation, and client approvals for audit purposes;
* Preparation of a *“Marketing and Tender Evaluation Report”* detailing the marketing and evaluation process, assessments of all developer appraisals leading to a clear recommendation to Homes England as to the preferred development partner and where appropriate, an under bidder;
* Provide a *“Franking Valuation Report”*
* Input into the drafting for the G4 report to secure formal Homes England approval to the selection of the preferred development partners;

**Stage 3**

* Generate Heads of Terms and provide negotiation support to Homes England in concluding an *“Agreement for Lease”* with the selected development partners, including advice on any post tender price adjustments;
* Liaison with Homes England’s legal and technical consultants as necessary in concluding the *“Agreement for Lease”* and *“Building Lease”* with the selected development partner;
* Liaise and work in partnership with the appointed solicitors;
* Liaise and discussion with local planning authority and other bodies as appropriate;

**Stage 4**

* Ongoing liaison with the selected development partners and monitoring of the partner’s development proposals to ensure they are in line with the agreed strategy;
* Attendance where required at meetings with the Local Planning Authority;
* Support to Homes England in considering requests from the selected development partner for approval to draft planning application/s;

**General**

* Regular client review meetings with Homes England;
* Provide information, as requested by Homes England in order to prepare papers and reports;
* Liaison and partnership working with the appointed legal and technical consultants and the Multidisciplinary supplier team;
* Overall project management of the Property Consultant team ensuring effective working and communication between the consultant team and with Homes England. Co-ordination of progress meetings and provision of regular progress reports;

Your fee proposal which should pay regard to the “General” provisions above, should be submitted in four amounts for Stages 1 to 4 as outlined above.

1. **Key Deliverables**

In selecting a development partner, Homes England intend to invite Expressions of Interest from the DPS, short list a number of appropriate bidders, and then invite detailed bids from them. This intention may change however, dependent on the advice of the appointed consultant.

The detailed tender brief will comprise a comprehensive development brief giving details of Homes England existing knowledge of the Site, relevant planning, and landscape information, bid options and submission requirements. A draft sale agreement and heads of terms will also be included in the tender pack based on Homes England standard documentation.

The shortlisted bidders will then be invited to respond to the brief. Detailed bids should include (but not limited to):

1. Any proposed refinement of the master plan for the Site;
2. A phasing and delivery plan;
3. Details of the design (including Building for a Healthy Life compliance), and local design and sustainability standards to be achieved;
4. Utilities, Drainage and Services Proposals;
5. A planning strategy;
6. Financial terms and a strategy for treatment of any uplifts/overages.

We would endeavour by this method, to appoint a partner who could optimise land value payments whilst ensuring high design quality, maximising housing delivery rates, employing MMC principles and including affordable homes.

1. **Site Information**

Homes England is in the process of commissioning a Multidisciplinary Supplier team and a number of technical studies & reports will be prepared in support of the masterplan preparation and outline planning application. These will be provided to the consultant at the appropriate time.

Pre-application community engagement will be undertaken prior to the planning application, which is programmed to be submitted to the Local Planning Authority in October 2024.

The masterplan will be informed by Homes England’s design reviews of proposals, pre-application discussions with the Local Planning Authority and will be assessed by Homes England for compliance with Building for a Healthy Life scheme.

**Site Constraints and Considerations**

Environmental

* The entire site is located in flood zone 2 and is adjacent to a 100m stretch of culverted river.
* No preliminary ecological assessment has been undertaken but given that half of the site will be cleared, and the other half is predominantly hardstanding with high security lighting, our expectation is that the site has limited ecological significance.
* Air quality and noise will be a key consideration for any re-development proposal given the site’s proximity to both the railway line and the Middleway highway.

Highways

* With the arrival of HS2 and the introduction of the clean air zone to Birmingham, a number of planning documents have made reference to the remodelling of the Middleway including the Birmingham Transport Plan 2031, Our Future City: ‘Draft Central Birmingham Framework 2040’ and HS2 highways plans. Accordingly, liaison with Birmingham City Council and HS2 is critical as they will have a significant impact on the Middleway site.
* Homes England is also liaising with Birmingham City Council regarding the possibility of stopping up the Montague Street access to Lawley Middleway. At present, this is used as a rat run.

Planning

* Sharing the southern boundary of the site is the former Mercedes garage, which has an extant planning permission for a temporary change of use (expiring 17th March 2028) as a banqueting and events venue (reference 2022/09282/PA).
* Planning permission for the Garrison Circus site, to the south of the Middleway site, was submitted in June. The proposal is for 515 Build-to-Rent apartments (Use Class C3), 686 units of Purpose-Built Student Accommodation (Sui Generis), 913sqm of flexible commercial floorspace (Use Class E). The scheme is made up of a number of buildings, the tallest of which is 37 storeys (reference 2023/04130/PA).

1. **Indicative Programme**

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

|  |  |
| --- | --- |
| **Key Delivery Milestones** | **Anticipated Date** |
| Commencement Date of Commission | 05/02/2024 |
| Market Assessment | Spring 2024 |
| Soft Market Testing completed | Summer/Autumn 2024 |
| Outline planning application submitted | October 2024 |
| S106 Agreement and planning consent issued | October 2025 |
| Establish Disposal Strategy and issue EOI to DPS | March 2025 |
| Issue, review, and complete Sifting Brief [if more than 5 EOIs] | July 2025 |
| Issue ITTs, review and complete | September 2025 |
| Selection of preferred Development Partner following DPS tender process | February 2026 |
| Enter conditional contract | 30/09/2026 |
| Reserved Matters approved and discharge of conditions | May 2027 |
| Start on site | July 2027 |

1. **Management**

The Supplier will work with the core Project team within Homes England’s Central Development team to deliver this Project. The day-to-day contact from Homes England the Supplier will liaise with, will be the Senior Development Manager within the Disposals team who will project manage the commission.

**Meeting Requirements:**

* **Start-up meeting**

We will expect a start up meeting to be held within two weeks of the appointment so that an immediate start on this commission can be made. This will be attended by the core team of Homes England. Confirmation that the named lead Consultant is available for an immediate start is required.

* **Review meetings**

The lead Consultant will be required to attend fortnightly progress meetings with Homes England’s Senior Development Manager to provide updates on the workstreams. There may be the requirement to attend a wider Project Review meeting on occasion, this will be communicated 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.

1. **Risks**

Local plan timeframe

Birmingham City Council has started the Local Plan refresh process. The Call for Sites closed on 31 July 2023, and we expect the preferred options consultation in the coming months. The recent publication of the Draft OFC confirms the Council’s ongoing ambitions for the Digbeth area; however, we will be preparing a planning application whilst local planning policy is developing.

In addition, the strategy for the remodelling of Lawley and Watery Lane Middleway is still under development, only the principle of the remodel has been introduced. The negative impact of the road on the site in its current state and there is a risk that the remodel of the road will not come forward, our mitigation strategies to deal with the noise and air quality challenges will have to bear this in mind.

As mentioned above, the OFC places the site within the Garrison Park Quarter Growth Zone, an improved city quarter connecting Digbeth with Bordesley Green with a wide range of opportunities for new homes and workspaces. However, the framework has not yet been finalised and so engagement with the City Council is paramount.

Delays to wider development

There are a number of pipeline schemes in the area that are yet to come forward. We expect that their development timelines are linked to the arrival of HS2 at the Curzon Street Station currently under construction. At present, services between London and Birmingham are expected to begin between 2029 and 2033. We are currently looking to bring this site forward for development significantly earlier than 2029 and, as such, there is risk associated with being the “first movers” in the area. However, in Homes England’s support of vibrant and successful places, we look to catalyse wider regeneration through our interventions and will seek to minimise this risk by securing a viable and market facing outline planning permission to mitigate planning risk on site.

1. **Payment**

The successful bidder will be expected to provide a plan at the inception stage to show when fees will be payable including a forecast of fees and costs. This will be reviewed and updated monthly.

1. **Limitation of Liability (if appropriate)**

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

1. **Termination**

Should performance during the period of this appointment prove unsatisfactory following the Poor Performance meeting provisions set out in the Management section above, Homes England will exercise its right under the Termination and Suspension of the Contract clause in the Framework Contract to give notice to terminate the arrangement with immediate effect.

If the services are no longer required, for whatever reason, then Homes England reserves the right to terminate the appointment and pay for services completed at that point.

1. **Conflict of Interest**

Homes England will exclude the Supplier if there is a conflict of interest which cannot be effectively remedied. The concept of a conflict of interest includes any situation where relevant staff members have, directly or indirectly, a financial, economic, or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.

Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Supplier to inform Homes England, detailing the conflict in a separate Appendix.

1. **Confidentiality**

This Further Competition ITT and associated information is confidential and shall not be disclosed to any third party without the prior written consent of Homes England. Copyright in this Further Competition ITT is vested in Homes England and may not be reproduced, copied, or stored on any medium without Homes England's prior written consent.

Suppliers shall not undertake, cause, or permit to be undertaken at any time any publicity in respect of this Further Competition process in any media without the prior written consent of Homes England.

1. **Health and Safety**

Homes England takes health and safety very seriously and expects all Suppliers to do the same. All Suppliers must adhere to the Health and Safety obligations in the Framework Contract and the following Homes England policies where applicable:

* Homes England Safety, Health, and Environment Policy
* Homes England Asbestos Policy
* Homes England CDM Policy

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

**1. General**

1.1 The Further Competition deadline is 12:00 on 19/01/2024 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](mailto:ProContractSuppliers@proactis.com).

* 1. Suppliers **must** ensure that suitable provision is made to ensure that the submission is made on time. Any tender responses received after the Further Competition deadline shall not be opened or considered unless Homes England, exercising its absolute discretion, considers it reasonable to do so. Homes England, may, however, at its own absolute discretion extend the Further Competition deadline and shall notify all Suppliers of any change via ProContract.
  2. **Please note all communications during the tender period will be via the ProContract website. All Suppliers that have registered their interest for the Procurement will receive a direct email notification from ProContract on any updates via the Suppliers registered email address. No approach of any kind should be made to any other person within, or associated with, Homes England. It is the Suppliers responsibility to check the ProContract website for any updates to the Procurement process. No claim on the grounds of lack of knowledge of the above-mentioned item will be entertained.**
  3. The Supplier should check the Further Competition ITT for obvious errors and missing information. Should any such errors or omissions be discovered the Supplier must send a message via the messaging function on ProContract. No alteration may be made to any of the documents attached thereto without the written authorisation of Homes England. If any alterations are made, or if these instructions are not fully complied with, the tender response may be rejected.
  4. All clarification requests must be sent using ProContract no later than 5 working days before the Further Competition deadline shown on ProContract. Any queries submitted after this may not be answered. Homes England will respond to clarifications as soon as practicable.
  5. Suppliers should specify in their clarification questions if they wish the clarification to be considered as confidential between themselves and Homes England. Homes England will consider any such request and will either respond on a confidential basis or give the Supplier the right to withdraw the clarification question. If the Supplier does not elect to withdraw the question and Homes England considers any clarification question to be of material significance, both the question and the answer will be communicated, in a suitably anonymous form, to all prospective Suppliers who have responded. If Suppliers consider that page limits set out in Section 20 (Evaluation Criteria) are insufficient to provide the information required by the question then a clarification request should be raised. No guarantee can be given that the page limit will be increased.
  6. Tender responses must not be accompanied by statements that could be construed as rendering the tender response equivocal and/or placing it on a different footing from other Suppliers. Only tender responses submitted without qualification strictly in accordance with the Further Competition ITT (or subsequently amended by Homes England) will be accepted for consideration. Homes England’s decision on whether or not a tender response is acceptable will be final.
  7. Tender responses must be written in English.
  8. Under no circumstances shall Homes England incur any liability in respect of this Further Competition or any supporting documentation. Homes England will not reimburse the costs incurred by Suppliers in connection with the preparation and submission of their tender response to this Further Competition.
  9. Homes England reserves the right to cancel this Further Competition process at any time.

**2. Quality**

* 1. A Response Form template has been provided in Part 2 to respond to the Quality questions detailed in Section 20 (Evaluation Criteria). The Response Form must be **completed and returned** as part of the tender response.
  2. Suppliers must provide information on proposed staff in the Response Form and Resource and Pricing Schedule provided in Part 2. If the Supplier is a consortium or intends to sub-contract the Services, in whole or in part, then it should specify precisely in the Resource and Pricing Schedule which economic operator shall perform the Services (or parts thereof).

**3.** **Pricing**

* 1. A Resource and Pricing schedule has been provided with this Further Competition ITT which must be completed and returned as part of the tender response.
* The pricing approach for this Further Competition is a lump sum fixed fee broken down for each stage of work detailed in the services required.
  1. The list of activities in the Resource and Pricing Schedule is not exhaustive and there may be additional duties/services required that will emerge as work is undertaken.  This commission may be extended on client instruction to cover such matters as arise, based on a time charged fee schedule completed in the tender response. The commission will only be extended if the services relate to the original objective of the overall call off contract.
  2. Suppliers are reminded that day rates for all individuals must be the agreed Framework Contract rates unless discounted rates are offered and will be used for all of the services.

1. **Evaluation**
   1. Tender responses will be evaluated on the basis of the overall most economically advantageous Tender (MEAT) submitted to Homes England. The evaluation criteria (and relative weightings) that Homes England will use to determine the most economically advantageous Tender are set out in Section 20 (Evaluation Criteria) below and the scoring approach is detailed in Section 25 (Worked Example). Scores will be rounded to two decimal places.
   2. Evaluators will initially work independently. Once they have completed their independent evaluation they will meet to discuss, understand and moderate any differences they have via a consensus meeting, where a single consensus score for each question will be agreed.
   3. Award decisions will be subject to the standstill period if over the FTS Services threshold. Unsuccessful Framework Suppliers will be provided with their scores and feedback to explain the award decision.
2. **Documents to be Returned**

Suppliers are expected to provide the following information in response to this Further Competition ITT:

* Completed Response Form
* Completed Resource and Pricing Schedule
* Supporting CVs for staff proposed to undertake this commission (no more than 2 pages each)

1. **EVALUATION CRITERIA**

|  |  |  |  |
| --- | --- | --- | --- |
| Quality will account for 40**%** of the Overall Score. The following scoring methodology will apply:  **5 – Excellent** Satisfies the requirement and demonstrates exceptional understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.  **4 – Good** Satisfies the requirement with minor additional benefits. Above average demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.  **3 – Acceptable** Satisfies the requirement. Demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services.  **2 - Minor Reservations** Some minor reservations of the Supplier’s understanding and proposed methodology, with limited evidence to support the response.  **1 – Major Reservations/Non-compliant** Major reservations of the Supplier’s understanding and proposed methodology, with little or no evidence to support the response.  **0 - Unacceptable/Non-compliant** Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Supplier has the understanding or suitable methodology, with little or no evidence to support the response.  **PLEASE NOTE:**  If your response scores 0 or 1 for any one question your overall submission will be deemed as a fail.  Any text beyond the specified page limits below will be ignored and will not be evaluated.  Homes England will not cross-reference to other answers when assessing quality responses.  Evaluators will initially work independently. Once they have completed their independent evaluation they will meet to discuss, understand and moderate any differences they have via a consensus meeting, where a single consensus score for each question will be agreed. | | | |
| **Number** | **Criteria** | **Demonstrated by** | **Weighting** |
| 1 | **Technical Merit of Proposal and Understanding of Project Requirements**  **PAGE LIMIT:**Maximum 6A4 pages | Statement outlining method and approach explaining how the commission will be undertaken  A detailed schedule of services to be delivered  Information on other Supplier input that may be required  Identification of other information that may be required  Where appropriate identify the potential impact of external influences and stakeholders  Other commentary on the brief  Supported by relevant examples, where applicable, demonstrating how they are relevant to the approach proposed and the role undertaken by your firm and the relevant team member  Confirmation that all services required to deliver the brief are provided. Any exclusions/assumptions must be included in your response  Demonstrate understanding and experience of using development appraisals to influence and shape masterplans  Through use of comparable examples, demonstrate:  working as part of a multidisciplinary team to fully consider constraints, opportunities, and phasing in order to shape market facing masterplans  approach to preparing development appraisals and assessing financial viability and use of software models | 15% |
| 2 | **Staff and other Resources**  **PAGE LIMIT:**Maximum 2 A4 pages plus Staff CVs | Who will undertake the commission and why have they been chosen?  Identify key members of staff and allocation to the required services  How much time will they devote to it?  Supported by resourcing information provided in Resource and Pricing Schedule  Supported by CVs for key members of staff | 10% |
| 3 | **Management and Communication**  Provide a statement explaining how this commission will be managed and who will be responsible for reporting to the client and Project Team, including a communications strategy.  **PAGE LIMIT:**Maximum 3 A4 pages | How will the commission be managed?  Who will be responsible for reporting to the Client?  Who will manage the team?  Where subcontracting arrangements are in place, who will manage the contract?  Who will attend site visits / client meetings?  Communication strategy  Supported by relevant examples, where applicable, demonstrating how they are relevant to the approach proposed | 10% |
| 4 | **Programme**  Please provide a programme highlighting key milestones in order to meet the requirements of the brief.  **PAGE LIMIT:**Maximum 2 A4 pages | What is the programme for the required services?  Are the programme dates we have given achievable?  Identify risks which may affect the programme or costs, what impact they may have, and any mitigation. | 5% |

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| --- | --- | --- |
| Price will account for 60% 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 | 60% |

1. **Worked Example**

**How your quality scoring will be used to give a weighted score**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Bidder | Question | Score out of 5 | Weighting | Weighting Multiplier | Weighted Score | Total Weighted Score |
| Supplier A | 1 | 3 | 15% | 3 | 9 | 25 |
| 2 | 4 | 10% | 2 | 8 |
| 3 | 3 | 10% | 2 | 6 |
| 4 | 2 | 5% | 1 | 2 |
| Supplier B | 1 | 5 | 15% | 3 | 15 | 34 |
| 2 | 4 | 10% | 2 | 8 |
| 3 | 4 | 10% | 2 | 8 |
| 4 | 3 | 5% | 1 | 3 |
| Supplier C | 1 | 2 | 15% | 3 | 6 | n/a (fail)\* |
| 2 | 1 | 10% | 2 | n/a |
| 3 | 2 | 10% | 2 | 4 |
| 4 | 2 | 5% | 1 | 2 |

\* in the example above Supplier C’s pricing will not be scored

**Worked example of how your price will be used to calculate a score**

|  |  |  |  |
| --- | --- | --- | --- |
| Bidder | Form of Tender price | Lowest price/Supplier’s price (as %) | Price Score (out of 60) |
| Supplier A | 350 | 350/350 = 100% | 100%\*60 = 60 |
| Supplier B | 700 | 350/700 = 50% | 50%\*60 = 30 |
| 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 | 25 | 60 | 85 | 1 |
| Supplier B | 34 | 30 | 64 | 2 |
| Supplier C | n/a | n/a | n/a | n/a |

**Part 3**

**3.1 RESPONSE FORM**

|  |  |
| --- | --- |
| **Framework:** | Property & Financial Services Framework |
| **Project Title:** | Middleway Property Consultant services |
| **ProContract Identification Number:** | DN [insert] |
| **Supplier:** | [insert] |
| **Date:** | [insert] |

To enable Homes England to evaluate your tender, we require Suppliers to respond to the questions below whilst making reference to the evaluation section above.

Please refer to the evaluation section for page limits for each question. Any text beyond this will be ignored and will not be evaluated.

|  |
| --- |
| **1. Technical Merit of Proposal** |
| **2. Understanding of Project Requirements** |
| **3. Staff and other Resources** |
| **4. Management and Communication**  **5. Programme** |

**3.2 RESOURCE AND PRICING SCHEDULE**

Excel spreadsheet to be embedded by Supplier in response.