**Property and Financial Professional Services**

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

**Bristol Temple Quarter Strategic Development Advisory**

**Issue Date: 3/11/2022**

**ProContract Identification Number:** **DN636454**

Table of Contents

Introduction4

**Part 1 – Commission Requirements**

1. Commission Background5
2. Objectives7
3. The Services8
4. Key Deliverables10
5. Indicative Programme11
6. Management11
7. Fee Scope12
8. Payment12
9. Risks12
10. Collateral Warranty12
11. Termination13
12. Conflict of Interest13
13. Confidentiality13

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

1. General14
2. Quality15
3. Pricing15
4. Evaluation16
5. Documents to be Returned17
6. Evaluation Criteria18
7. Worked Example21

**Part 3** – **Response Form**

3.1 Response Form24

3.2 Resource and Pricing Schedule26

**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**

**Introduction**

The Bristol Temple Quarter Joint Delivery Team is inviting tenders for the provision of strategic development advisory services with the expertise in complex regeneration programmes delivered by the public sector in partnership with the private sector.

**Project Background**

In close proximity to Bristol city centre, the area promoted as Bristol Temple Quarter Regeneration Programme (BTQRP) comprises around 130 hectares of land with the potential to deliver up to 10,000 new homes and 22,000 additional jobs. The programme area includes Temple Quarter, which covers Bristol Temple Meads railway station and the area around it (known as phase 1), and a section of the River Avon, the Feeder Canal and a large area of brownfield land currently in predominantly employment and industrial uses known as St Philip’s Marsh (known as Phase 2). Please see plan in Figure 1.

In 2018 Bristol City Council (BCC) together with Homes England, Network Rail, and the West of England Combined Authority (WECA) commissioned a multi-disciplinary team of consultants led by Mott Macdonald to produce a Development Framework for the BTQ area. This informed a business case for a programme of station improvements and other strategic works for the area including infrastructure requirements, land uses and guiding principles/concepts. At the time of writing, the Development Framework is not yet published but it is expected that a public consultation will take place in late 2022 with a view to publishing the Development Framework in 2023, subject to Bristol City Council Cabinet’s endorsement. Once endorsed, the Development Framework will be a material planning consideration.

A funding ask of Government for £95m of investment to deliver three new station gateways and unlock land around the station to deliver 2,500 homes in Phase 1 was approved by HM Treasury earlier in 2022. These homes will be delivered on sites owned by BCC, Homes England, Network Rail and private sector landowners.

To unlock the wider housing/mixed use opportunity in Phase 2 further infrastructure works including flood defences, residual flood risk mitigation measures, utilities upgrades and highway infrastructure modifications on St. Philip’s Marsh are required.

A Memorandum of Understanding (MoU) was signed between the four partners (Homes England, Network Rail, WECA and BCC) to secure joint commitment to the BTQ project and establish a Joint Delivery Team (JDT) to drive forward the Bristol Temple Quarter Regeneration Programme. The JDT is now established with an interim Director in place. The work that the JDT undertakes to progress the BTQ programme (Phase 1 and Phase 2) will be complex with multiple inter-linked workstreams.

The JDT is now seeking to appoint a Strategic Development Advisor (SDA) with the expertise in regeneration that can support in responding to the opportunities and challenges in delivering the current and future programme of activities.

**Figure 1: Bristol Temple Quarter site planDiagram

Description automatically generated**

**Delivering Phase 1**

The JDT is progressing Phase 1 of the Regeneration Programme through three core tasks:

**1. Delivering the Phase 1 infrastructure investment package**

The JDT is expected to deliver almost all of the infrastructure projects required for Phase 1 of the Bristol Temple Quarter Regeneration Programme. The only exception to this is for the highway works required for the Redcliffe Way development, which Bristol City Council will progress by itself. The two key infrastructure projects that are being progressed and are currently at the end of RIBA 1 are the Northern Entrance (upgrades to the main station entrance) and Southern Gateway (a new station entrance to the south of the station).

**2. Securing vacant possession on public-sector owned sites**

A number of major sites where the public sector partners are the freeholders currently have a variety of fragmented third-party leasehold interests over them. The JDT, working with Bristol City Council’s Land and Property team, will need to develop a strategy to work with existing leaseholders to deliver development platforms so these sites can be redeveloped to the timetable assumed.

**3. Delivering residential and commercial development**

A range of potential options have been considered for how the JDT will progress the Phase 1 development sites. The JDT will look to guide the public land delivery and release into the market while working with the private-sector landowners to encourage them to develop their land (where required) and to support the promotion of their developments. The JDT will also work to ensure planning policy and individual planning consents are progressed where required so as not to impede development. This co-ordinated approach will provide confidence to developers, investors, commercial occupiers and future residents.

**Delivering Phase 2**

Phase 2 work is in the initial stages and therefore less defined than Phase 1. Some of the key workstreams to progress for Phase 2 include the following:

* Masterplanning, including:
  + Visioning
  + St. Philip’s Marsh Masterplan
  + Infrastructure Delivery Plan
  + Employment Land Strategy
  + Flood Mitigation Strategy
  + Sustainability Strategy
  + Transport Strategy
  + Implementation and Phasing Strategy
* Land Assembly Strategy
* Engagement
* Financial Model
* Outline Business Case

**Programme Wide Workstreams**

There a several workstreams which will support both Phase 1 and 2 and include:

* Employment and Skills Strategy
* Social Value Strategy
* Cultural Strategy

The above list is not exhaustive and other workstreams may be included as the project progresses. The SDA is not expected to feed into all of the above workstreams as other consultants with the relevant expertise will already be in place or will be appointed when needed. However, it is expected the selected consultant will be familiar with the above workstreams to help inform the scope of services the SDA will be undertaking, in particular St. Philip’s Marsh Masterplanning and Outline Business Case development.

1. **Objectives**

The role of the SDA will be to sit alongside the client team and advise over the long term on various aspects of the regeneration programme. The objectives of the SDA work will therefore closely align with the objectives of BTQ. The objectives for Phase 1 of BTQ are clearly defined and set out below. The objectives for Phase 2 are yet to be defined.

**Objectives of Phase 1**

The objectives for Phase 1 of the Bristol Temple Quarter Regeneration Programme are as follows:

1. Kickstart the first phase of the Bristol Temple Quarter Regeneration Programme by unlocking 2,500 new homes and 2,200 gross direct jobs in Bristol Temple Quarter and surrounding sites.

2. Make Bristol Temple Quarter and surrounding areas a sustainable and flourishing new urban quarter at the very heart of Bristol, which brings together world-class placemaking, transport connectivity and amenity benefits for residents, occupiers and visitors alike.

3. Make a significant contribution to the transformation of Bristol Temple Meads into an improved, fit-for-purpose, 21st century transport interchange, with specific improvements to placemaking and improved access in the immediate area surrounding Bristol Temple Meads.

4. Support a coordinated, long-term regeneration vision that is shared and delivered in partnership between Bristol City Council, WECA, Network Rail and Homes England.

5. Enable the Bristol Temple Quarter regeneration area and surrounding sites, including Bristol Temple Meads, to act as a catalyst for future investment into the West of England.

**Objectives of Phase 2**

The objectives for Phase 2 of the Bristol Temple Quarter Regeneration Programme have not yet been defined and the SDA will be expected to provide support in defining the objectives.

1. **The Services**

The JDT will require a consultant team to provide strategic development and real estate advisory services to provide ongoing support to delivery of the BTQ Programme. The appointed Advisor will have expertise in strategic regeneration delivered by the public sector in partnership with the private sector.

The intention is to create a long-term contract where the Consultant will provide strategic commercial and real estate advice across the JDT’s integrated work streams. The Consultant will work closely alongside project partners, the wider project team, and wider stakeholders. The Consultant will have a duty of care to Homes England, Network Rail, Bristol City Council and West of England Combined Authority; all of whom will participate in the delivery and enablement of Bristol Temple Quarter Regeneration Programme.

The Consultant will need to respond flexibly to the JDT’s requirements across the fields of real estate, town planning, public procurement, financial services, and business case planning. These services will need to be delivered concurrently with the advisor providing integrated services across JDT’s different work streams.

The list of activities in the Scope of Services table below 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 they arise, based on a time charged fee schedule completed in the tender response.

**Scope of Services**

The required scope for the Strategic Development Advisor will include the following:

|  |  |
| --- | --- |
| **A. Strategic Development Advisory services** | |
| **1** | Provide evidence-based **property market advice** including sales, rental, and investment comparables; advice on occupier demands (including specification); advice on transaction structures and absorption; and advice on the value of a range of uses including (but not limited to) residential, commercial, community and industrial. |
| **2** | Provide **desktop** **valuations** and undertake **Red Book** **valuations** in accordance with RICS appraisal and valuation standards and any other relevant guidance. This includes valuations of the following tenures and uses:   * Residential – including market sale, low-cost rent and intermediate affordable housing tenures, Build to Rent (BTR), co-living, [student, later life, live-work] * Commercial – including office, industrial, affordable workspace, retail, food and beverage, leisure, and hotels. * [potentially other uses] |
| **3** | Provide **forecasting** on real estate investment and development market trends, including value inflation and regeneration uplift and sector innovations. |
| **4** | Advise on the cost/value impact of meeting **environmental sustainability standards** including innovative solutions to zero carbon standards, connection to district heat and power networks, and sustainable drainage systems. |
| **5** | Input to **masterplanning** on aspects such as development capacity, layouts, massing, efficiencies, land use mix, infrastructure, and phasing. This may include continuous refinement and review of **masterplan viability**, including, but not limited to, optimising uses, responding to market trends and project design changes, and taking into account wider placemaking benefits. |
| **6** | Undertake **site-specific viability** testing on key sites and assist in value engineering where required on certain plots. |
| **7** | Review **build cost assumptions** across different tenures and uses and provide evidence-based advice on construction costs. |
| **B. Structuring and partnering** | |
| **1** | Represent the JDT in soft-market testing and **early market engagement** with potential Master Developer Partners, developers, and Registered Providers of affordable housing to determine the procurement route and delivery strategy. |
| **2** | Advise on **development market activity** and developer capabilities, exposure, and sentiment for different partnership and procurement structures. |
| **3** | Advise on **partnership and transaction** **structuring options** between the Partners, with the aim of optimising public sector receipts whilst achieving delivery objectives. This includes but is not limited to:   * Partnership structure options with one or more Master Developer Partners, including sale and development agreement, joint venture partnership, public sector master developer and a special purpose vehicle. * Partnership structure options with public sector partners, including land pools, inter-governmental land transfers, and equity waterfall models. * Transaction structure options with public/private landowners. |
| **4** | Prepare and deliver a **developer procurement strategy** for bringing landholdings to market and/or for raising private sector funding. |
| **5** | Support and advise on the **procurement of a development partner** including preparation of papers and advice for recommendations through governance processes. |
| **6** | Support the JDT in its analysis of **Subsidy Control and tax** implications and compliance with any relevant procurement regulations. |
| **C. Finance and funding** | |
| **1** | **Develop a financial model to financially appraise the scheme** and undertake scenario analysis and sensitivity testing to support decision making on the Reinvestment Strategy, land assembly and delivery strategy, optimise the cashflow profile, and minimise the future funding requirement. |
| **2** | Undertake **regular updates** or modifications to the financial model(s) to support the ongoing monitoring and appraisal of the project. This is to reflect scheme changes, market changes, and further development of the delivery or commercial strategy. |
| **3** | Advise on **private financial and capital market activity** and opportunities for innovative funding and finance structures that promote strategic objectives such as Environmental, Social and Governance objectives. |
| **4** | Provide evidence-based market advice on **debt financing options and terms** (including infrastructure loans) and **sales transaction structures**, including forward funding. |
| **5** | Advise on **public sector funding and investment opportunities** to define the type and level of Government intervention (if any) required to unlock and accelerate housing and delivery of the scheme. This includes public sector loan, equity, and Treasury or other sources. |
| **6** | Provide advise and test the **structuring of public sector participation** in the development including the impact of providing debt, equity or grant investment, the deferral of receipts for land, or the potential participation of the public sector as a shareholder in a public/private vehicle. |
| **D. Business case support and public funding** | |
| **1** | Support a potential future **business case** and cashflow modelling to secure public sector funding including from the Treasury or other sources. This includes feeding into the commercial, financial, economic and management case. |
| **2** | Provide **drafting in support of business cases**, including the OBC. |
| **3** | Provide **financial analysis in support of business cases**. |
| **E. Project management** | |
| **1** | Liaise with Client, consultants, legal and project teams. |
| **2** | Act as lead consultant and manage sub-consultants where required. |
| **3** | Prepare presentations and briefings for BTQ Programme leadership (Directors Board and Strategic Board) and governance and external parties as requested. |

In addition, the optional scope for the Strategic Development Advisor will include the following:

|  |  |
| --- | --- |
| **F. Planning advice** | |
| **1** | Provide town planning advice in relation to the Phase 1 infrastructure items and associated development plots, when necessary. This will include, but not be limited to, advice relating to the overall planning strategy for the Phase 1 infrastructure items and the Environmental Impact Assessment. The planning strategy should include advice on the content and phasing of planning applications. |
| **2** | Provide town planning input into the masterplan including advising on the acceptability of the masterplan against adopted and emerging policy throughout its preparation, if required. Advice may also be required in relation to the final form of the masterplan to ensure it has sufficient weight in planning decision making and in the context of the wider ambitions of the programme, particularly in terms of land assembly. |
| **3** | Strategic planning policy advice relating to the inclusion of Temple Quarter and St. Philip’s Marsh in the emerging Local Plan. This may include making representations on behalf of the partnership. Incorporate planning information in any marketing packages for sites. |

1. **Key Deliverables**

The deliverables will be shaped by the needs and requirements of the regeneration programme as it progresses through different stages. In general, it is expected that both written and oral advice will be provided as well as attendance at meetings.

Below is a list of outputs and responsibilities that is anticipated in the next 12 months. The list includes activities that the JDT is aware of currently but is by no means exhaustive and other unexpected requirements should be assumed.

* **Procurement, structuring and partnering:** Prepare and deliver a developer procurement strategy for bringing landholdings to market and/or for raising private sector funding, including the setup of a delivery vehicle. Support and advise on the procurement of a development partner, including preparation of papers and advice for recommendations through governance processes.
* **Soft market testing:** Represent the JDT in soft-market testing and early market engagement with potential Master Developer Partners, developers, and Registered Providers of affordable housing to determine the procurement route and delivery strategy.
* **Financial modelling:** Financially appraise the scheme and undertake scenario analysis and sensitivity testing to support decision making on the Reinvestment Strategy, land assembly and delivery strategy, optimise the cashflow profile, and minimise the future funding requirement.
* **Market advice and design input:** Provide market advice to inform development capacity, layouts, massing, efficiencies, land use mix, infrastructure, and phasing. Undertake site-specific viability testing on key sites to help decide on uses and quantum.
* **Business Case:** Provide drafting and financial analysis in support of the development of the early and emerging business case for Phase 2.

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 | 12/12/22 |
| Soft market testing | November 2022 – January 2023 |
| Developer Procurement Strategy | January 2023 – February 2023 |
| Delivery vehicle setup | Autumn 2023 |
| Market advice and design input | Autumn 2023 |
| Financial model | March 2023 |
| Phase 2 Business Case | June 2023 |
| Completion Date | 12/12/23 |

1. **Management**

The Supplier will be managed by the JDT representing all four partners.

Bidders shall provide a named SDA Project Lead / Contract Manager who shall be the main contact for the JDT. All services provided under this Contract will be managed, co-ordinated, and endorsed by the Project Lead.

Meetings and reporting will be defined by each of the Key Deliverables.

**Meeting Requirements:**

* **Start-up meeting**

It is expected the start-up meeting will be held w/c 12/12/21.

**Review meetings**

It is expected that review meetings will happen on an ad-hoc basis as and when needed.

* **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. **Fee Scope**

The contract charges for all deliverables will be on a time and materials basis. Final costs will be confirmed at the point of service delivery using the schedule of rates provided.

Bidders shall provide a target (estimated) fee schedule for the Key Deliverables in the first 12 months outlined in section 4. For the Scope of Services, Bidders shall provide a fixed Schedule of Rates for all the named Resources who are expected to work on the contract.

Named resources with the appropriate skillsets should be identified within the pricing schedule.

1. **Payment**

Payment is proposed against the defined Key Deliverables above. Payment is to be agreed and finalised once the selected consultant is in place.

1. **Risks**

There is a significant amount of complexity involved with the Project and the consultant will be expected to understand key risks and provide support in risk mitigation.

1. **Collateral Warranty**

Pursuant to clause 2.18 of the Framework Agreement, the successful Consultant will be required to provide Deeds of Collateral Warranty to Network Rail, Bristol City Council and West of England Combined Authority.

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. **Contract**

This commission is expected to be a long-term appointment with the contract running for up to four years. The first 12 months of the commission are defined by, but not limited to, the Key Deliverables. Beyond the first 12 months the support required and outputs expected are yet to be defined. It is expected the SDA will be flexible and adaptable to the needs of the JDT.

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

1. **General**

1.1 The Further Competition deadline is **10:00** on **2/12/22** 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.

# 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).

# 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.
  2. The pricing approach for this Further Competition is: phased approach.

Please see table below provided further guidance on the phased approach to pricing.

|  |  |  |
| --- | --- | --- |
| **Phase** | **% Marks Available** | **Fee** |
| Phase 1: Key Deliverables in the first 12 months\* | 50% | Lump sum fee to be submitted, with detail provided on each of the Key Deliverables |
| Phase 2: Any other work beyond or in addition to the Key Deliverables | 50% | Standard Framework Rates with any discount explicitly outlined in proposal |

\*Not to be confused with Phase 1 and Phase 2 of the BTQ regeneration programme. The above phases only related to the fee schedule.

* 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 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 CV’s for staff proposed to undertake this commission (no more than 2 pages each)

# EVALUATION CRITERIA

|  |  |  |  |
| --- | --- | --- | --- |
| Quality will account for 70**%** 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 | **Understanding of Project Requirements**  **PAGE LIMIT:**Maximum threeA4 pages | Demonstrate a clear understanding of the key elements of this commission, including the Objectives and the Scope of Services.  Describe the skills and expertise required for the commission.  Describe the challenges that are anticipated and how these will be overcome.  State your understanding of and ability to deliver on being flexible, adaptable and responsive to the needs of the JDT.  If needed, support your response with relevant examples of similar projects and other previous experience. | 15% |
| 2 | **Methodology and Programme**  **PAGE LIMIT:**Maximum five A4 pages | For the Key Deliverables over the first 12 months of the commission:   * Outline your proposed methodology to carry out the Key Deliverables. * Provide a project programme identifying:   + Activities to be undertaken   + Outputs / deliverables   + Resource   + Timescales   Provide a schedule of services to be delivered, including those that sit outside of the Key Deliverables.  Where relevant identify areas of innovation and added value.  Where appropriate identify the potential impact of external influences and stakeholders.  Provide a Risk Register detailing key risks and assumptions with mitigations. | 15% |
| 3 | **Staff, Resources and Management**  **PAGE LIMIT:**Maximum fiveA4 pages | Propose a project team that has a depth of demonstrable experience against the Scope of Services.  Outline a suitable mix of junior and senior grades as proportionate to the Scope of Services.  Provide a team organogram / resource schedule.  Set out who will be the Project Lead and how the commission will be managed.  Demonstrate how the proposed project team is well-positioned to deliver the Scope of Services, with a particular focus on the Key Deliverables.  Include information on any sub-consultant support that may be required and demonstrate their technical expertise relating to the relevant parts of the commission.  Clearly set out the governance, accountability and lines of communication within the project team.  Provide CVs for key members of staff. | 15% |
| 4 | **Relevant Experience**  **PAGE LIMIT:**Maximum fiveA4 pages | Provide relevant experience demonstrating the ability to deliver the Scope of Services.  Include details of client name, the point of contact and position in the organisation, contract start and completion date and contract value.  Include at least three examples that are of similar scale and complexity to BTQ.  Include experience that covers the services below:   * Providing advice on appropriate structures and entities such as partnerships and companies. Advising on partnership and transaction structuring options between public sector partners, as well as between public and private sector parties. * Advising on debt financing options and terms (including infrastructure loans) and sales transaction structures, including forward funding. * Developing a financial model in Excel for a large-scale regeneration programme that is / was used to inform delivery strategy, land assembly strategy, funding strategy or business case. * Advising on phasing strategy, land assembly and CPO for a complex and long-term programme. * Advising on public sector funding and investment opportunities to define the type and level of Government intervention, including supporting a business case. * Advising on the cost/value impact of meeting environmental sustainability standards including innovative solutions to zero carbon standards.   For the services above, clearly state in your response where the experience provided covers these services. State where the proposed team members have been involved.  Include a discussion over how the knowledge, experience and learning from these projects can assist with this scope. | 15% |
| 5 | **Social Value**  **PAGE LIMIT:**Maximum fourA4 pages | Demonstrate how you will support the government’s Social Value commitment through your organisation's ways of working and policies.  Your response should demonstrate how you will support two of the key social value award criteria below:   * Tackling economic inequality: Create employment and training opportunities particularly for those who face barriers to employment and/or who are located in deprived areas, and for people in industries with known skills shortages or in high growth sectors. * Fighting climate change: Influence staff, suppliers, customers and communities through the delivery of the contract to support environmental protection and improvement. * Equal opportunity: Demonstrate action to identify and tackle inequality in employment, skills and pay in the contract workforce. * Wellbeing: Demonstrate action to support health and wellbeing, including physical and mental health, in the contract workforce.   For each social value award criteria chosen, please include:  - Your ‘Method Statement’ stating how you will achieve the social value award criteria  - A timed project plan and process, including how you will implement your commitment and by when. Also, how you will monitor, measure and report on your commitments/the impact of your proposals. You should include but not be limited to:   * timed action plan * use of metrics * tools/processes used to gather data * reporting * feedback and improvement * transparency   - How you will influence staff, suppliers, customers and communities through the delivery of the Framework to support the Policy Outcome, i.e, engagement, co-design/creation, training and education, partnering/collaboratingindividuals within your organisation within the recruitment service operations.   * Demonstrate collaboration with users and communities in the co-design and delivery of work through the framework to support strong integrated communities. * Influence staff, suppliers, customers to support mental health and wellbeing in workplace. | 10% |

|  |  |  |
| --- | --- | --- |
| Price will account for 30% 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 | 30% |

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 | 35 |
| 2 | 4 | 15% | 3 | 12 |
| 3 | 3 | 15% | 3 | 6 |
| 4 | 2 | 15% | 3 | 4 |
| 5 | 2 | 10% | 2 | 4 |
| Supplier B | 1 | 5 | 15% | 3 | 15 | 47 |
| 2 | 4 | 15% | 3 | 12 |
| 3 | 4 | 15% | 3 | 8 |
| 4 | 3 | 15% | 3 | 6 |
| 5 | 3 | 10% | 2 | 6 |
| Supplier C | 1 | 2 | 15% | 3 | 6 | n/a (fail)\* |
| 2 | 1 | 15% | 3 | n/a |
| 3 | 2 | 15% | 3 | 4 |
| 4 | 2 | 15% | 3 | 4 |
| 5 | 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 30) |
| Supplier A | Phase 1: 5,000  Phase 2: 350 | Phase 1: 5,000/5,000 = 100%  Phase 2: 350/350 = 100% | Phase 1: 100%\*15 = 15  Phase 2: 100%\*15 = 15  Total = 30 |
| Supplier B | Phase 1: 10,000  Phase 2: 700 | Phase 1: 5,000/10,000 = 50%  Phase 2: 350/700 = 50% | Phase 1: 50%\*15 = 7.5  Phase 2: 50%\*15 = 7.5  Total = 15 |
| Supplier C | Phase 1: 8,000  Phase 2: 250 | n/a | n/a |

**Worked example of Overall Score and Ranking**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Bidder | Total Quality Score | Price Score | Total Score | Ranked Position |
| Supplier A | 31 | 50 | 81 | 1 |
| Supplier B | 41 | 25 | 66 | 2 |
| Supplier C | n/a | n/a | n/a | n/a |

# Part 3

# 3.1 RESPONSE FORM

|  |  |
| --- | --- |
| **Framework:** | [insert] |
| **Project Title:** | [insert] |
| **ProContract Identification Number:** | DN [insert] |
| **Supplier:** | [insert] |
| **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. Understanding of Project Requirements** |
| **2. Methodology and Programme** |
| **3. Staff, Resources and Management** |
| **4. Relevant Experience** |
| **5. Social Value** |

# 3.2 RESOURCE AND PRICING SCHEDULE

Excel spreadsheet to be embedded by Supplier in response

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