



Homes  
England

# **Development and Regeneration Technical Services (DaRTS) Framework**

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

**Infrastructure Grants Project Management –  
Commission for Cost, Programme, Risk and  
Project Delivery Assurance 2023-2026**

Issue Date: 9<sup>th</sup> October 2023

ProContract Identification Number: DN691134



## 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 – Response Form and Resource and Pricing Schedule**

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

# Part 1 - Commission Requirements

## A PROJECT BRIEF

### 1. Commission background

Homes England, the national housing agency, plays a central role in tackling the housing challenges the country now faces. We are the Government's housing accelerator. Our mission is to intervene in the market to ensure more homes are built in areas of greatest need.

Homes England set out a five year strategic plan in May 2023, (see link here: [Homes England Strategic Plan 2023-2028](#)). Our Mission is to:

*"...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."*

(Homes England Strategic Plan 2023-28)

Our Investments Directorate is a specialist delivery business unit being responsible for various types of funding that contribute to the building of more homes. This funding is delivered on behalf of the Department for Levelling Up, Housing and Communities (DLUHC).

The Infrastructure Grants team sits within the wider Investments Directorate and manages the provision of capital grants to fund infrastructure and unlock housing capacity where it is needed most. The grant programmes are available to local authorities on a competitive basis which:

- Delivers new physical infrastructure;
- Makes more land available for housing in high demand areas;
- Supports ambitious local authorities; and
- Enables local authorities to recycle the funding for other infrastructure projects.

In this Further Competition we are looking to procure Cost, Programme, Risk Review and Project Delivery Assurance services from existing partners via the Development and Regeneration Technical Services Framework (DaRTS). The purpose of this exercise is to obtain annual third-party assurance reports which independently assess current project cost, risk and contingency allowances in addition to providing a detailed review of infrastructure works programmes in order to identify any potential deliverability challenges or opportunities for betterment. The projects will initially be drawn from our Housing Infrastructure Fund (HIF: FF) and Housing Infrastructure Grant (HIG) programmes with further projects potentially coming forward from other programmes at a later date (subject

to approval and business requirements) including from the Brownfield, Infrastructure and Land (BIL) fund.

Following the Expression of Interest (EOI) Stage, this Invitation to Tender (ITT) has been issued to **10** Framework Suppliers who confirmed their interest in this commission.

## **2. Delivery strategy**

Each project requiring cost, programme, risk and deliverability assurance services will be subject to its own delivery strategy and specific information will be provided to the supplier following appointment.

## **3. High level objectives**

Our funded projects are large, strategic and high-impact infrastructure projects that will unlock new homes in the medium and longer term. These projects are at variable stages of delivery however many are currently in either the concept or detailed design phase. Due diligence of project costings and deliverability were carried out as part of the contracting process that took place prior to the award of grant funding. Since then, project cost estimates, risk registers and infrastructure work programmes have been periodically updated by the responsible Local Authorities in accordance with contractual and monitoring requirements - either through the use of dedicated internal resource or specialist consultants procured by the Local Authority.

Due to the size and scope of these projects and their national visibility amongst stakeholders, Homes England requires independent, multi-year annual assurance of these schemes which in turn will inform our approach to financial planning in addition to monitoring and implementing contractual funding arrangements moving forward. In particular, this commission has the following high-level objectives:

- 1) To procure three 'Preferred Suppliers' from the existing DaRTS framework for the purposes of undertaking annual, independent 'deep dive' reviews of selected projects across the Housing Infrastructure Fund (HIF: FF) and other programmes as required.
- 2) Over a three-year period, to obtain a standalone annual report for each project which includes a detailed review of current cost, risk and contingency estimates in addition to an assessment of the infrastructure works programme and procurement/contracting strategy to ensure that buildability, deliverability, constraints, dependencies and work package interfaces have been appropriately considered.

- 3) Where available, to leverage existing relationships between suppliers and Tier 1 contractors in order to validate pricing information and to obtain further specialist assurance input as required including that pertaining to buildability and work package scheduling.
- 4) By sharing final outputs with delivery partners and demonstrating best practice, to improve the overall quality of project cost, risk, contingency and programme information provided by the Local Authority which in turn will provide all parties with greater confidence in delivery moving forward.

**For the avoidance of doubt, this commission is for the provision of a standalone cost, programme, risk and deliverability assurance report only which is to be produced on an annual basis for each project, for each of the three financial years of the commission. It should not be confused with the separate further DaRTS competition ‘BIL, HIF and Infrastructure Funding Due Diligence Services (DaRTS Framework) 2023-2028’ (ProContract Number: DN682567) which is seeking to procure a number of preferred suppliers for the provision of a wider range of technical and assurance services on an ongoing direct award basis for a period of up to five years.**

It is difficult to provide certainty on the overall commission value for this work as the exact number of Projects is unknown. There are currently 120 live (contracted) HIF projects and other projects from similar grant programmes. It is estimated that Cost, Programme, Risk and Project Delivery Assurance is required on approximately 20 - 30 projects, and we estimate the value of this work to be approximately £1,000,000 per annum, for each of the three years of the commission.

Please see Appendix 1 for a summary of the contracted HIF projects and approximate value of works.

#### **4. Allocation of work amongst suppliers**

4.1. As with any further competition under the Framework, Preferred Suppliers will be selected based on their ranked score for both Quality (70%) and Price (30%) (see Parts 2-3 below). The three Preferred Suppliers who submit the ‘Most Economically Advantageous Tenders’ (MEAT) will be selected.

4.2. Thereafter, subject to confirmation that there are no conflicts and the next available supplier confirming that they have capacity to undertake the services, projects will be allocated to suppliers on an approximately equal basis, at the value of each suppliers

tendered fixed fee (as adjusted in accordance with the framework indexation approach) until all such projects under this commission have been allocated. We will continually monitor the allocation of work over the life of the commission. However, no form of exclusivity or volume guarantee of work is given by Homes England and Homes England is at all times entitled to enter into other contracts and arrangements with other suppliers for the provision of any or all services which are the same as or similar to the Services.

4.3. If a supplier is unable or unwilling to provide the services when requested, Homes England shall ask the next ranked supplier on an iterative basis to provide the services until a supplier accepts the Instruction.

4.4. Homes England may, in its reasonable discretion, allocate projects on a number of bases including, but not limited to, individual award or award based on geographical or portfolio grouping. Such decisions will be informed by a variety of factors which may include:

- a) Experience of working on a particular type of site/infrastructure and the ability to bring specialist knowledge and expertise.
- b) Understanding of the site(s) based upon previous allocations within this commission, or of sites of a similar nature.
- c) Potential 'benefits of scale' and consistency reasons (e.g. a tranche of sites in close geographical proximity or being owned/delivered/managed by a single Local Authority).
- d) Conflicts of interest.
- e) Supplier capacity and resourcing.
- f) Anything else which Homes England may consider pertinent from time to time.

4.5. In the event of a significant change to a project Homes England may, from time to time and at its absolute discretion, request an interim update to the annual project report. Any such updates will be managed by exception as an extension to the commission (see Part 2 'Instructions for Submitting a Response', point 5.5).

4.6. Instructions for individual project commissions will be issued to suppliers via Homes England's Transaction Management System (TMS) in the usual manner.

4.7. All appointments are subject to performance monitoring. Poor performance could result in termination of Direct Appointments (see Part C, Section 3 'Termination') and potentially deselection as a Preferred Supplier.

## **5. Quality standards**

Project reports should be presented in a standard professional format (see 'Part B: Consultant Brief' below) and should be informed by relevant best practice guidance and standards as applicable to the activity and stage of the project lifecycle (e.g. RICS NRM and 'Black Book' process documents, the Infrastructure and Projects Authority's May 2021 'Cost Estimating Guidance', HM Treasury's 'Green Book' (2022)).

## **6. Site Information**

Each project requiring cost, programme, risk and deliverability assurance services will comprise of one or more sites and specific information will be provided to the supplier following appointment.

## **7. Risk summary**

There are no known risks associated with this commission. Risks associated with any project e.g. specific site/delivery risks will be provided to the supplier following appointment.

## **8. Stakeholders**

As a sole or contributory funder to the projects, Homes England represents the primary stakeholder and suppliers will be expected to engage with the allocated HE project manager throughout the lifetime of the commission in order to deliver the services specified. Where required for regulatory, audit or other purposes, Homes England may share outputs of the commission with other public bodies including, but not limited to, the Department for Levelling Up, Housing and Communities (DLUHC), the National Audit Office (NAO) and the Infrastructure and Projects Authority (IPA).

Each project may involve a number of stakeholders including local authorities, combined authorities, contractors, consultants, landowners, developers, community/interest groups, political figures etc. It is expected that the Homes England project manager and Local Authority project leads will be the primary point of contact for this commission however suppliers should remain vigilant and be aware of the range of stakeholders who may have an interest in their allocated projects.

## **B CONSULTANT BRIEF**

### **1. Indicative Programme**

These dates are indicative only to illustrate the period of the commission envisaged. Suppliers should note the indicative dates when submitting their response to the quality questions in the Response Form.

The commission will last for approximately 3 years from the date the commission commences, with the opportunity to extend at Homes England's discretion if required. The commission may be subject to early termination arising from a change in government policy, change in working arrangements for programmes, lack of transactions and/or future pipeline or any other grounds which Homes England may consider reasonable at its sole discretion. Early termination would be subject to 3 months' notice.

<b>Key Delivery Milestones</b>	<b>Anticipated Date</b>
Commencement Date: EOI Issued	22 September 2023
EOI Returns	06 October 2023
ITT Issued	9 October 2023
Tender Closing Date	17 November 2023
Tender Assessment Period	20 - 30 November 2023
Outcome Notification	4 December 2023
Standstill Period	4 December 2023 – 15 December 2023
Appointments Confirmed	18 December 2023



## **2. The services and deliverables**

### **2.1. Project and Cost Management Services**

#### **2.1.1. Review of Costs and Cost Controls**

We require a full review of the cost estimate report to be undertaken for each project. The selection of a suitable contingency allowance will be subject to the professional judgement of the successful bidder and client contingency will need to meet the guidance within the Green Book (2022), unless there is a clear rationale for deviation from this. The report should be presented in a standard professional format and should include, but not be limited to:

- the rationale and methodology used;
- details of information sources and internal quality review/checking processes;
- a base date;
- a comprehensive list of assumptions and exclusions based on the totality of information available to the supplier;
- summary page showing the costs in aggregate broken down into elemental format;
- detailed information on key risks and opportunities, and;
- conclusion and recommendation on next steps.

Where a project is in the construction phase, the commercial arrangements should be reviewed to determine whether the project can be delivered within its contractual and funding envelope. This should include, but not be limited to, the following:

- a review of contractor forecasts to check that these are being updated regularly and are based on sufficient information and valid assumptions.
- a review of the Application for Payment assessment process using a recent AfP as an example (preference to be given to main works AfP's where available).
- a review of the change/compensation event register and methodology of assessing the same.

### **2.1.2. Review of Risk and Opportunity Management Protocols**

The risk management strategy for each project shall be reviewed in order to ascertain whether risk is being managed appropriately on the project. This should include, but not be limited to, consideration of the following:

- whether a suitably qualified individual has been identified and is responsible for risk management on the project, whether the overall risk management methodology is suitable for the project and if risk review meetings are being held on a regular basis.
- a review of the risk register to determine if all key risks have been highlighted, quantified and assigned to a risk owner with appropriate mitigation activities specified.
- whether opportunities are being identified, quantified and recorded with appropriate measures being put in place in order to realise the same.
- Whether the quantified risk allowance is appropriate for the overall level of project risk.

### **2.1.3. Review of Programme/Schedule**

The project programme should be reviewed (in MPP, XER or other appropriate model format as required) to determine whether there is confidence in delivery timescales. This should include, but not be limited to, consideration of the following:

- whether a suitably qualified individual has been identified and is responsible for managing the programme and if the programme is being reviewed on a regular basis.
- does the programme contain sufficient detail for the current and future stages, with all major milestones included.
- is the programme logic accurate, has the critical path been correctly identified and has a sufficient amount of activity and terminal float been included.
- whether there are potential opportunities for programme betterment.

#### **2.1.4. Review of Project Cost Forecasts**

Homes England annual budgets are based on forecasted project expenditure. The expenditure forecasts should be reviewed to make an assessment as to whether Homes England can be confident that these are accurate. This should include, but not be limited to, consideration of the following:

- whether the correct information sources are being utilised for forecasting.
- does the expenditure forecast tally with the project programme/schedule.
- are the key components of the forecast based on an accurate bottom-up estimate or appropriate benchmarking.

Meetings with the Local Authority and their delivery partners will be required to understand this project in detail and to obtain the relevant information, in addition to a wrap-up meeting with the dedicated Homes England Project Manager to discuss the reports. The Project Manager from Homes England will be available to assist with gathering information required for the project, although full responsibility for successful delivery of the commission will remain with the supplier.

#### **2.1.5. Review of Procurement and Contracting Strategy**

The procurement strategy for the project should be reviewed to determine whether this is appropriate and sufficiently robust based upon the current lifecycle stage to enable delivery in accordance with programme timescales and the overall cost envelope. This should include, but not be limited to, consideration of the following:

- whether the procurement strategy is suitable for the type of infrastructure being delivered and the constraints of the project.
- whether a range of options have been considered and suitably discounted based on an assessment of all relevant factors including LA and supply chain capacity, risk apportionment, design/buildability requirements, timescales for mobilisation etc.
- has a preferred form of contract been identified and any key terms agreed e.g. fixed vs target cost pricing, secondary options/provisions, bonds, guarantees etc.
- are suitable arrangements in place for administering the design and construction contract(s) (or have such arrangements been identified).
- for projects not yet contracted, are there potential opportunities to expedite delivery and/or realise cost efficiencies.

## **2.2. Construction, Design, and Management (CDM) and Health & Safety Services**

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

## **3. Key staff required**

Homes England requires consistency of approach and reporting for all projects awarded under this commission. Delivery of all subsequent instructions must be managed by a named national lead contact (director level) with named and suitably qualified technical leads allocated to each project e.g. senior/chartered QS, senior planner, construction manager etc.

In accordance with 'Part 2 – Instructions for Submitting a Response' below, suppliers should detail the staff involved in resourcing each of the activities when pricing the commission.

If the Supplier needs to replace any key staff during the commission, an equally qualified and experienced replacement must be proposed by the supplier and approval for their replacement must be given by the Homes England Project Manager prior to such an individual taking part in the commission.

## **4. Other consultants being used/procured**

It is currently expected that each project under this commission will be managed by the single allocated supplier and that no other consultants will need to be procured by Homes England and engaged on individual projects.

Details of other consultants (if any) employed by Homes England and engaged on individual projects will be provided following appointment.

## **5. Meeting and reporting requirements**

This commission is issued by Homes England's Infrastructure Funding Team. The Project will be led by the Head of Infrastructure Grants Project Management (North), reporting to the Director of Infrastructure Funding.

Prior to appointment all queries regarding this commission must be referred to Homes England via Pro Contract – no contact should be made directly with the named Homes England project manager until after appointment.

Upon appointment, suppliers shall report to the allocated Homes England Project Manager for their respective projects. Such individuals will be the key point of contact for appointed suppliers in addition to Local Authority leads who hold detailed project information.

An 'introductory/'kick off' meeting should be held for each project at the start of the commission to provide the opportunity for suppliers to meet the Homes England Project Manager and project leads from the Local Authority and to obtain the information required in order to deliver the services. This will be arranged by the Homes England Project Manager and should ideally occur within 15 business days of project allocation being confirmed.

Regular communication with the allocated Homes England Project Manager will be required and updates provided accordingly. Should a material issue arise, either Homes England or the appointed supplier may request a meeting with the other to discuss such matters subject to the provision of a reasonable period of notice.

A final review meeting will be required with the Homes England Project Manager prior to submission of the completed deliverables in order to discuss key findings and to present the proposed outputs.

Poor Performance meetings will hopefully not be required. However, if poor performance is repeated following escalation to the suppliers' 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 the occurrence of such a meeting, will 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.

In the event that a reserve supplier is called-up at a later date, Homes England will ensure that the introductory meeting covers any areas of change or elements that have been difficult for either Homes England or the previous supplier to resolve. This should ensure that the reserve supplier is brought up to speed quickly and can successfully work on projects.

## **C CONTRACT MATTERS**

### **1. Payment**

Subject to the receipt of a valid invoice from the supplier, payment will be made upon submission of the final output report (to the reasonable satisfaction of the appointed Homes England Project Manager) for each individual project under this commission.

### **2. Collateral Warranty**

A Collateral Warranty will not be required for the purposes of undertaking this commission.

### **3. Termination**

Should performance during the period of this appointment prove unsatisfactory following the Poor Performance meeting provisions set out in the 'Meeting and reporting requirements' 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.

## Part 2 - Instructions for Submitting a Response

### 1. General

- 1.1. The Further Completion Deadline is **17:00pm on Friday 17th November 2023**. Tender responses **must** be submitted on ProContract. Please regularly check ProContract for any amendments to the Further Competition deadline. For all ProContract portal issues please contact [ProContractSuppliers@proactis.com](mailto:ProContractSuppliers@proactis.com).
- 1.2. Suppliers **must** ensure that suitable provision is made to ensure that the submission is made on time. Any tender responses received after the Further Competition deadline shall not be opened or considered unless Homes England, exercising its absolute discretion, considers it reasonable to do so. Homes England, may, however, at its own absolute discretion extend the Further Competition deadline and shall notify all Suppliers of any change via ProContract.
- 1.3. **Please note all communications during the tender period will be via the ProContract website. All Suppliers that have registered their interest for the Procurement will receive a direct email notification from ProContract on any updates via the Suppliers registered email address. No approach of any kind should be made to any other person within, or associated with, Homes England. It is the Suppliers responsibility to check the ProContract website for any updates to the Procurement process. No claim on the grounds of lack of knowledge of the above-mentioned item will be entertained.**
- 1.4. The Supplier 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.
- 1.5. All clarification requests must be sent using ProContract no later than 5 working days before the Further Competition deadline shown on ProContract. Any queries submitted after this may not be answered. Homes England will respond to clarifications as soon as practicable.

- 1.6.** Suppliers should specify in their clarification questions if they wish the clarification to be considered as confidential between themselves and Homes England. Homes England will consider any such request and will either respond on a confidential basis or give the Supplier the right to withdraw the clarification question. If the Supplier does not elect to withdraw the question and Homes England 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.
- 1.7.** Tender responses must not be accompanied by statements that could be construed as rendering the tender response equivocal and/or placing it on a different footing from other Suppliers. Only tender responses submitted without qualification strictly in accordance with the Further Competition ITT (or subsequently amended by Homes England) will be accepted for consideration. Homes England's decision on whether or not a tender response is acceptable will be final.
- 1.8.** Tender responses must be written in English and both Microsoft and PDF versions of tender documents must be submitted.
- 1.9.** Under no circumstances shall Homes England incur any liability in respect of this Further Competition or any supporting documentation. Homes England will not reimburse the costs incurred by Suppliers in connection with the preparation and submission of their tender response to this Further Competition.
- 1.10.** Homes England reserves the right to cancel this Further Competition process at any time.

## **2. Conflict of Interest**

- 2.1.** 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.
- 2.2.** 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.



### 3. Confidentiality

- 3.1.** 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.
- 3.2.** 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.

### 4. Quality

- 4.1.** A Response Form template has been provided in Part 3 to respond to the Quality questions detailed in Part 2 Section 8 (Evaluation Criteria). The Response Form must be **completed and returned** as part of the tender response.
- 4.2.** 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).

### 5. Pricing

- 5.1.** A Resource and Pricing Schedule has been provided with this Further Competition ITT in Part 3, which must be completed and returned as part of the tender response.
- 5.2.** The pricing approach for this Further Competition is: fixed fee per project.
- 5.3.** In addition to the provision of a fixed fee for completion of the services for each individual project, bidders are requested to provide a breakdown of the cost of undertaking each of the cost, risk and programme activities in Section B, point 2.1 ('Project and Cost Management Services') above as set out in the Resource and Pricing schedule.
- 5.4.** Bidders are also requested to submit day rates in addition to the Resource and Pricing Schedule.
- 5.5.** 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.

**5.6.** 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.

**5.7.** Suppliers' Pricing schedules should reflect the Framework Contract terms – as set out in Schedule 2, in particular Clause 11 repeated here for ease of reference:

'The hourly charge out rate set out in Part 3 of Schedule 2 and any expenses or disbursements ....shall be reviewed annually by Homes England and will be increased at the absolute discretion of Homes England having regard to the annual Retail Price Index.'

## **6. Evaluation**

**6.1.** 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 Part 2 Section 8 (Evaluation Criteria) below and the scoring approach is detailed in Section 8.4 (Worked Example). Scores will be rounded to two decimal places.

**6.2.** 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.

**6.3.** 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.

## **7. Documents to be returned**

**7.1.** 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 A4 pages each for up to 10nr CV's in total)

## Part 2 - Instructions for Submitting a Response (continued)

### 8. Evaluation criteria

#### 8.1. Scoring method

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.

## 8.2. Quality Questions

### Lots 1 and 2 – ITT questions

Number	Criteria	Tender requirement	Weighting	A4 limit
1	<b>Preparation and consistency of deliverables</b>	<p>Please demonstrate how you will produce the key deliverables within the prescribed timescales, whilst maintaining a high level of quality and national consistency between projects.</p> <p>Please explain how you will mobilise, coordinate and deploy suitably qualified staff across all instructed projects in order to balance resource levels and maintain consistency of output.</p> <p>Please explain the format of the final output and the professional, legislative and other standards/guidance you will follow.</p> <p>Please explain how you will obtain, store and coordinate the flow of information and deliverables required as part of this commission.</p> <p>Demonstrate how you would provide rigorous review and challenge information presented to deliver co-ordinated and optimised proposals across Homes England projects.</p> <p>Relevant examples should be provided in addition to indicative timescales and CV's of key staff required to deliver this commission.</p>	20%	<p>Maximum 4 A4 pages for response to main question.</p> <p>Maximum 2 A4 pages per CV (no more than 10 CV's in total)</p> <p>(11-point Corbel font)</p>

2	<b>Assurance of costs, cost controls and forecasts</b>	<p>In relation to the assurance of project estimates, forecasts and cost controls and informed by past experience:</p> <ul style="list-style-type: none"> <li>• explain how you will provide robust assurance of costs, particularly where information and comparables may be limited.</li> <li>• explain your approach to assessing project risk, contingency and optimism bias to ensure that suitable allowances will be included.</li> <li>• explain your approach and key areas of focus when assuring commercial controls on projects to ensure a balance between robustness and proportionality.</li> <li>• explain how you will assure project forecasts, ensuring that your assessment is coordinated with a review of the programme and other key information sources.</li> </ul>	20%	<p>Maximum 4 A4 pages for response to main question.</p> <p>(11-point Corbel font)</p>
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3	<b>Assurance of delivery (programme, risk and procurement)</b>	<p>In relation to the assurance of the project programme, risks and procurement strategy:</p> <ul style="list-style-type: none"> <li>• explain how you will provide robust assurance of the project programme to ensure deliverability for Homes England, particularly where activities may be missing or logic broken. How will you determine whether suitable float has been included?</li> <li>• explain where you see the key risks to programme and cost and how you will ensure that all key risks have been identified and suitably quantified.</li> <li>• explain how you will evaluate the appropriateness of the project procurement strategy, taking into account any constraints and local and national market intelligence.</li> <li>• explain how you will ensure that any opportunities for betterment are identified, providing examples of when your recommendations have previously resulted in cost savings and/or acceleration of delivery.</li> </ul>	20%	<p>Maximum 4 A4 pages (11-point Corbel font)</p>
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Lots 1 and 2 – ITT questions (continued)				
Number	Criteria	Tender requirement	Weighting	A4 limit
4	<b>Social Value</b>	<p>Please demonstrate how you will support the government’s Social Value commitment throughout delivery of this project.</p> <p><b>MAC2.3:</b> Support educational attainment relevant to the contract, including training schemes that address skills gaps and result in recognised qualifications.</p> <p>For each Model Assessment Criterion chosen, please include in your response:</p> <ul style="list-style-type: none"> <li>- Your ‘Method Statement’ stating how you will achieve the Model Assessment Criteria</li> <li>- 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: <ul style="list-style-type: none"> <li>○ timed action plan</li> <li>○ use of metrics</li> <li>○ tools/processes used to gather data</li> <li>○ reporting</li> <li>○ feedback and improvement</li> <li>○ transparency</li> </ul> </li> <li>- How you will influence staff, suppliers, customers and communities through the delivery of the project to support the Policy Outcome.</li> </ul> <p>Please see <a href="#">Social-Value-Model-Edn-1.1-3-Dec-20.pdf (publishing.service.gov.uk)</a> for more information on the Model Assessment Criteria</p>	10%	<p>Maximum 3 pages in total</p> <p>(11-point Corbel font)</p>

8.3 Price Evaluation

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%



## 8.4 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	20%	4	12	46
	2	4	20%	4	16	
	3	3	20%	4	12	
	4	3	10%	2	6	
Supplier B	1	5	20%	4	20	58
	2	4	20%	4	16	
	3	4	20%	4	16	
	4	3	10%	2	6	
Supplier C	1	2	20%	4	8	n/a (fail)*
	2	1	20%	4	n/a	
	3	2	20%	4	8	
	4	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	30,000	$30,000/30,000 = 100\%$	$100\% * 30 = 30$
Supplier B	75,000	$30,000/75,000 = 40\%$	$40\% * 30 = 12$
Supplier C	25,000	N/A – submission failed evaluation at quality stage.	N/A – submission failed evaluation at quality stage.

**Worked example of Overall Score and Ranking**

Bidder	Total Quality Score	Price Score	Total Score	Ranked Position
Supplier A	46	30	76	1
Supplier B	58	12	70	2
Supplier C	N/A	N/A	N/A	N/A

## Part 3 – Response Form

<b>Framework:</b>	[insert]
<b>Project Title:</b>	[insert]
<b>ProContract Identification Number:</b>	DN [insert]
<b>Supplier:</b>	[insert]
<b>Date:</b>	[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.

<p><b>Preparation and consistency of deliverables</b></p> <p>Maximum 4 A4 pages for response to main question.</p> <p>Maximum 2 A4 pages per CV (no more than 10 CV's in total)</p> <p>(11-point Corbel font)</p>	
<p><b>Assurance of costs, cost controls and forecasts</b></p> <p>Maximum 4 A4 pages for response to main question.</p> <p>(11-point Corbel font)</p>	
<p><b>Assurance of delivery (programme, risk and procurement)</b></p> <p>Maximum 4 A4 pages</p> <p>(11-point Corbel font)</p>	
<p><b>Social Value</b></p> <p>Maximum 3 pages in total</p> <p>(11-point Corbel font)</p>	

## Part 3 (continued) – Resource and Pricing Schedule

Excel spreadsheet to be embedded by Supplier in response.

## Appendix 1

Examples of HIF Forward Funding and Marginal Viability Funding Projects in contract

[Housing Infrastructure Fund - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/housing-infrastructure-fund)