



Homes
England

Making homes happen

Multidisciplinary Panel

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

Northern Arc, Burgess Hill

Issue Date: 21 January 2021

ProContract Identification Number: DN575252

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Introduction

The purpose of this Further Competition Invitation to Tender (ITT) is to award the call-off contract for the above commission.

We ask you to respond to the questions detailed in Part 2, Section 6 (Evaluation Criteria) using the [Response Form](#) and to return the Response Form and Resource and Pricing Schedule in Part 3 with your tender. This Further Competition ITT is divided into 3 parts:

Part 1 – Commission Requirement

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

Part 2 – Instructions for Submitting a Response

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

Part 3 – Standard Forms

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

Part 1 - Commission Requirements

1. Commission Background

Northern Arc is a strategic site of up to 3,500 homes as part of a new, mixed-use community with subregional importance. It is a strategic allocation in the Mid Sussex District Council (MSDC) Local Plan and provides a fantastic opportunity to support housing and economic growth within the South East. The Homes England Strategic Plan 2018-2023 identifies Northern Arc as a strategic development priority and is supported by key stakeholders including the Local Authority and the Coast to Capital Local Enterprise Partnership.

Homes England, as the Government's housing delivery agency, is excited and ambitious for delivery of this site, as it is situated within an area of major housing need, and has stepped in where the market faces challenges and facilitates early delivery. However, Homes England's core objectives are more than just housing delivery. We can offer a tailored package that secures high quality design, creates sustainable communities and provides the greatest opportunities for local people to access the housing market. Homes England's successful track record of enabling scheme delivery is clearly demonstrated by examples such as Northern Arc and Northstowe.

The delivery of the Northern Arc started in Summer 2020 and is expected to continue until 2033 in a series of four phases, each comprising a number of sub-phases as identified in the Sub-Phase Location Plan appended to the Outline Planning Permission S106 Agreement. This appointment follows significant preparatory work, which has secured Outline Planning Permission for the main Northern Arc site, additional approvals for the Eastern Bridge and Link Road, and the Western Link Road, alongside preliminary works for on- and off-site infrastructure works.

The contents of this Invitation to Tender should be treated on a **strictly commercially confidential basis** and should not be disclosed beyond the immediate team involved in the preparation of any response. Please refer to Chapter 13 of the Panel Appointment of Consultant Contract relating to the Multidisciplinary Framework Panel for full details.

The purpose of this Invitation to Tender is to invite successful candidates to interview (if required) w/c **28 March 2022**. In order to do this, please respond by **1700 02 March 2022** using the **Response form**.

2. Objectives

The focus of Homes England is now firmly on the delivery stage at Northern Arc and seeks to ensure that the pace continues. In its role as Master Developer, Homes England wishes to appoint a Lead Consultant to take on the next stage in this long-term project from its Multidisciplinary Framework Panel and safeguarding and its ambition in accelerating the delivery of homes and infrastructure across the site. The lead planning consultant aspect of the appointment will likely be phased with an initial 2.5 year instruction (March 2022 – December 2024) plus a potential

extension of 1 year (2025), the highways contract management and supervision aspects of the appointment are envisaged to run until completion of these contract(s).

3. The Services

Homes England is mindful that one consultancy may not have access to all the expertise needed to fulfil this brief. Homes England encourages consultants to collaborate as needed to ensure the highest level of advice in each service as set out below. The appointed Lead Consultant will act as lead for these sub-contractors. Homes England will be involved with the selection of the sub-consultants and it will have the ultimate decision to appoint the sub-consultants.

4. Key Deliverables

The below sets out the key work streams that are expected to be required as part of this commission. This has been expanded on from the Sifting Brief, so please review carefully.

Please note that the key deliverables identified are minimum requirements and it is expected that the successful consultant will provide additional deliverables to the Homes England and wider project team as required to ensure successful outcomes. In some instances, it will be necessary to use standard Homes England templates.

1. Project Familiarisation / Onboarding

- Project inception and familiarisation

2. Project Wide Project Management

- Lead and co-ordinate the multidisciplinary team to establish and implement the phasing plan and programme, including linkages between the infrastructure delivery, plot developers and the wider project – in as much as it related to Homes England’s role as the Master Developer. Coordinate the discharge of condition and planning obligations for the main planning permission and provide oversight and regular communication of the other relevant planning permission delivered by other parties
- Lead and coordinate the multidisciplinary team to manage inputs and deliverables across the project
- Setting up and managing appropriate file management and file sharing online system
- Provide regular updates and project briefings to ensure best practice from the project is captured and communicated
- Adopting and providing strong and effective project and stakeholder governance
- Host project team meetings every two weeks alternating between a London office and online (i.e. once a month it will be face to face subject to Covid-19 regulations). Provide agendas and minutes of all meetings
- Preparation, management and monitoring of project programme and risk identification and management strategy
- Prepare and maintain project wide cost / spend profiles and forecasts, and update on a monthly basis
- Oversight of schools and health care delivery at programme level

- Build upon the Project Execution Plan and be responsible for overseeing the risk management strategy
- Construction design and management (CDM) services
- Preparation of developer technical packs which will support disposal of serviced plots through Homes England Delivery Partner Dynamic Purchasing System

Key deliverables: Project Execution Plan, Project Directory, Risk Register and Reporting Mechanisms, Spend Forecasts

3. Planning

- Attend meetings and manage planning applications (e.g. Section 73 and discharge of conditions) with MSDC and update the team with the outcomes of any communication
- Monitor and lead on any further promotion of the strategic site as require
- In partnership with MSDC, advise and lead on the planning strategy for the Northern Arc project with Homes England. This will include ensuring meeting Homes England policy objectives relating to MMC, accelerated Pace, design and diversification and SMEs
- Discharge conditions on the OPP and coordinate site wide planning conditions and planning obligations set out in the S106
- Provide a register of conditions and programme interface
- Review Reserved Matters prepared by infrastructure contractors and plot developers to ensure they align with the OPP, Design Guide and Street Design and Adoption Manual.
- Preparation or updating of Delivery Strategies / Frameworks, i.e. Phasing, Town Centre, Employment and Skills Plans and Landscaping etc.

Key deliverables: Planning Condition Schedule and RACI register, Reserved Matters Programme, Spend Forecasts

4. Marketing / Communication / Engagement

N.B. the communications role will be reviewed after 3 months in line with Homes England's wider Land Directorate Communications Procurement Strategy

- Working closely with the Homes England Project and Communications teams and MSDC to lead and implement the ongoing Communication Strategy for all elements of the Northern Arc development, which could include, but not be limited to, engagement with the Open Space and Environment Liaison Group, engagement with Members, Clinical Care Commission Group and Department for Education. Proactive marketing communications include drone and video footage of the emerging development
- Acting as lead consultant and principal point of contact for communication and public relation matters, relating to the project on behalf of Homes England in its role as master developer
- Management of Northern Arc social media and email inbox
- Manage and provide advice / support on the Northern Arc website in line with our digital protocol

- Ongoing input into the Public Art Strategy (or preparation if not agreed by appointment) including place-making / branding as appropriate
- Ecology, biodiversity and landscaping support to public engagement activities, e.g. newsletters and events, including the Open Space and Ecology Liaison Group, which meets quarterly
- Coordinate the marketing teams of MSDC, Homes England and their development partners (infrastructure contractors and plot developers) across the Northern Arc project
- To develop and prepare key messages, press releases and statements
- To establish and manage all digital and media communications. This will include setting up and maintaining a dedicated project website
- Monitoring a project specific email inbox and co-ordinating responses to queries received

Key deliverables: Community Engagement, Updated Communications Plans, Regular Website Updates, Weekly News Monitoring Reports

5. Urban Design

- Delivery focus against a set of agreed requirements: Design Guide, Street Design and Adoption Manual and Building for a Healthy Life and other relevant strategies such as National Model Design Codes
- Landscape design, and green links
- Placemaking in the Neighbourhood centres
- Provide design lead on future plot disposals
- Advice on public art strategy

Key deliverables: Utilities Strategy Design, civil engineering design drawings, urban design and land scaping drawings

6. All Social, Environmental and Economic Infrastructure Provision including Education, Health etc

- Infrastructure assessment, concept design, testing, costing and preparation of IDP
- Preparation of cost plan
- Advising on infrastructure consents
- Engagement and liaison with relevant Stakeholders and Statutory Undertakers

Key deliverables: Community Employment Plan, Stewardship Plan and Adoptions Strategy

7. Ecology, Biodiversity and Landscaping

- Ecological support to Estates Management in line with the Transitional Landscape and Ecology Management Plan

- Biodiversity Progress Reports (if relevant – needs to be done before first 500 homes occupied on main scheme) including input on Biodiversity Net Gain matters and any updates to the Biodiversity Scheme as a result
- Ecological and landscaping support for the early delivery of ecological mitigation and restoration work, e.g. for protected species, river habitat improvements, etc.
- Ecological support for the submission of EPS mitigation licenses by developers through preparing / updating masterplans for each species and ensuring a cohesive approach to mitigation / compensation across the scheme
- The Western Neighbourhood Park will be designed and delivered by the Developer Partner who is selected to deliver this neighbourhood park and plot. The consultant should make an allowance to review and proposals by the Developer Partner to ensure it aligns with the agreed Western Neighbourhood Park specification

Key deliverables: Open Space Delivery and Implementation Strategy / Landscape and Ecology Management Plan

8. Transport, Highways inc infrastructure delivery

To be read in conjunction with but not limited to the detailed specification of technical services in Appendix 1

- Access, movement, highways, infrastructure, traffic and transport consultancy – oversee the strategy for the access, technical and regulatory compliance – S278 and S38 works, road and sustainable travel to support travel plan initiatives. There is an overarching Travel Plan, which can be found in the Outline Planning Permission documents linked above. There is a requirement for a Travel Plan Coordinator or management for appointing a Travel Plan Coordinator
- Principle designer under Construction (Design and Management) regulations 2015 (up until contractor appointment)
- Utilities strategy implementation for the remainder of phase 1, and phases 2, 3, and 4, including assistance with procurement of utilities and off-site reinforcement to serve the development
- Management of IDNO contract and incorporation of their design into civil design
- Allowance to develop the central highway section between the EBLR and WBLR to a both a tender and detailed design stage. Homes England may wish to engage with the highway authorities and other stakeholders prior to contractor appointment to agree technical aspects of the design in advance.
- Procurement of highway contractor for the Central Section of the Northern Arc Avenue. May use 'Find a Tender' open procurement or CCS framework. It is currently anticipated that a single contractor would be procured for this section of highway, however the consultant is to allow to scope and agree the most appropriate delivery strategy with Homes England
- Project and cost management and site supervision of the Central Section of the Northern Arc Avenue construction contract(s) to the completion of the works.
- To assist generally with procurement strategy of other aspects of Homes England directly delivered infrastructure such as green links, footpaths, green spaces etc. Aspects of which may be included within the contractor appointment for the central section of highway.

- To specify, procure, and manage ground investigations as required to support the central highway design as well as the surrounding housing development parcels (delivery phases 2,3 and 4). GI contractors' costs are not to be included within the consultant's fee proposal, however Homes England would wish to appoint the GI contractor via the supplier as a disbursement.

Key deliverables: Travel Plan Coordinator Proposal, tender documents, contract documents, infrastructure works monthly cost plans and reports

The multi-phase project will extend across several years. Key performance indicators, review dates and potential break clauses will be incorporated into the appointment to ensure project requirements and expectations are met. These will be communicated upon appointment. Agreed milestones, deliverables and expectations will be managed by Homes England.

5. Site Information

The delivery of the Northern Arc is expected to take place in a series of four phases, each comprising a number of sub-phases as identified in the Sub-Phase Location Plan appended to the Outline Planning Permission and S106 Agreement.

The approved Infrastructure Delivery Plan & Phasing Strategy set out the initial delivery strategy for homes and infrastructure at the Northern Arc, however, further refining means delivery is front-loaded to Phase 1 between 1st April 2020 and 31st March 2025, reducing the number of dwellings delivered in later phases. This reduces the overall development period for the Northern Arc scheme by two years.

Homes England previously appointed AECOM as the multidisciplinary consultant for the early stages of the project, to deliver a planning strategy, obtain approval for a comprehensive Masterplan and Infrastructure Delivery Plan & Phasing Strategy and Outline Planning Permission for the site in October 2019.

AECOM was appointed to provide Lead Consultant services (Delivery Phase) from July 2019 until March 2021 including appointment of contractors to deliver key infrastructure and the first plot developers. As the incumbent multidisciplinary consultant appointment is due to expire, Homes England wishes to undertake a competitive tender for the next stage of delivery with a view to ensure pace and focus on delivery continues and secures value for money.

Homes England has received HM Treasury approval to act as master developer for the next phases of the scheme i.e. Phases 2 – 4. This will include delivery of the central spine road which this appointment will cover.

Homes England has the eastern and western extents of the Northern Arc Avenue (EBLR and WBLR respectively) under contract and under construction currently by John Sisk and Jacksons civil engineering contractors. These two

contracts are currently being managed by RegenCo who would continue to manage these contracts to completion. Both of these contracts are anticipated to be completed by the end of 2022.

Homes England is in the process of appointing an Independent Distribution Network Operator (IDNO) who will provide design and build electricity infrastructure to the central and western parts of the development, and would need to work alongside the further civils contractor.

There are a number of relevant planning permissions for the site. The Northern Arc Allocation Outline Planning Application was submitted on 24th December 2018. A supplementary planning submission was made on 12th August 2019. Further background can be found on the project website:

<https://www.burgesshill.net/housing/northern-arc>

Outline Planning Permission for the Northern Arc development was granted by Mid Sussex District Council on 4th October 2019 (reference DM/18/5114). The full set of planning application documents and associated correspondence is available at:

<https://pa.midsussex.gov.uk/online-applications/applicationDetails.do?activeTab=externalDocuments&keyVal=PK8M4RKTo4Loo>

A Section 106 Agreement was signed between Homes England, Mid Sussex District Council and West Sussex County Council on 4th October 2019. A copy of the Section 106 is available at:

<https://padocs.midsussex.gov.uk/PublicDocuments/00671231.pdf> (Part 1)

<https://padocs.midsussex.gov.uk/PublicDocuments/00671236.pdf> (Part 2)

<https://padocs.midsussex.gov.uk/PublicDocuments/00671240.pdf> (Part 3)

<https://padocs.midsussex.gov.uk/PublicDocuments/00671241.pdf> (Part 4)

<https://padocs.midsussex.gov.uk/PublicDocuments/00671243.pdf> (Part 5)

<https://padocs.midsussex.gov.uk/PublicDocuments/00671244.pdf> (Part 6)

Outline Planning Permission for the separate Freeks Farm development was granted by Mid Sussex District Council on 24th July 2019 (reference DM/18/0509). The full set of planning application documents, decision notice, legal agreement and associated correspondence is available at:

<https://pa.midsussex.gov.uk/online-applications/applicationDetails.do?activeTab=externalDocuments&keyVal=P3Q3M7KToDAoo>

Section 73 seeking alterations to conditions on planning permission DM/18/5114 was submitted on 10 September 2021 and is currently awaiting determination by MSDC. Details here in the following link. A Deed of Variation is being drafted in tandem to this Section 73.

<https://pa.midsussex.gov.uk/online-applications/applicationDetails.do?keyVal=QZFL75KTo4Loo&activeTab=summary>

Full Planning Permission for the Eastern Bridge and Link Road (EBLR) was granted by Mid Sussex District Council on 17th January 2020 (reference DM/19/3313). The full planning application was submitted on 15th August 2019, a supplementary submission of additional and amended drawings was submitted on 26th November 2019. The full set of planning application documents, decision notice and associated correspondence is available at:

<https://pa.midsussex.gov.uk/online-applications/applicationDetails.do?activeTab=externalDocuments&keyVal=PWJ4YMKToDAoo>

A Section 73 has recently been submitted and is awaiting validation. Once validated, the application will be available to view on MSDC planning portal.

Reserved Matter Approval for the Western Link Road (WLR) (Phase 1) was granted by Mid Sussex District Council on 10th July 2020 (reference DM/20/0254). The full set of planning application documents and associated correspondence is available at:

<https://pa.midsussex.gov.uk/online-applications/applicationDetails.do?keyVal=Q4I7X8KToCPoo&activeTab=summary>

A Section 73 has recently been submitted and is awaiting validation. Once validated, the application will be available to view on MSDC planning portal.

Full/reserved matters planning application for Green Super Highway for formation of a section of shared surface pedestrian and cycleway forming part of the Burgess Hill Northern Arc Green Super Highway, including a bridge crossing over the River Adur. Bridge increased in width and Cycle superhighway route altered was submitted on 2 June 2021 and is awaiting determination by MSDC. Full application details is available at:

<https://pa.midsussex.gov.uk/online-applications/applicationDetails.do?keyVal=QUDOTYKToDAoo&activeTab=summary>

A full planning history of Northern Arc is available through the following link and search 'Northern Arc':

<https://pa.midsussex.gov.uk/online-applications/>

6. Indicative Programme

Please see below for key dates from the programme relating to the delivery of the central section.

- Consultant design – March 2022 – November 2022
- Planning November 2022 – January 2022
- Contractor procurement December 2022 – March 2023

- Contractor Design and mobilisation March 2023 – November 2023
- Contractor works December 2023 – December 2024

A copy of the Development Phasing and Specification Plan is in **Appendix 2**. Please note, this is due to be updated in Spring 2022.

7. Management

The consultant will be required to maintain an up-to-date detailed forecast for each task (using Homes England issued template) and invoice monthly based on works undertaken. Invoices should be accompanied by a time narrative and outputs on work undertaken and submitted following monthly invoice update meeting with Homes England project team.

Key milestones and delivery targets will be agreed at the inception stage (Workstream 1) with the appointment of the consultant and stage fee approvals will be made on the satisfactory completion of these milestones.

Meeting Requirements:

- **Start-up meeting**

Date of start-up meeting will be confirmed upon award of the commission.

- **Review meetings**

Review dates / break clauses will be incorporated into the appointment to ensure project requirements and client expectations are met. If required, these review points may be amended by Homes England.

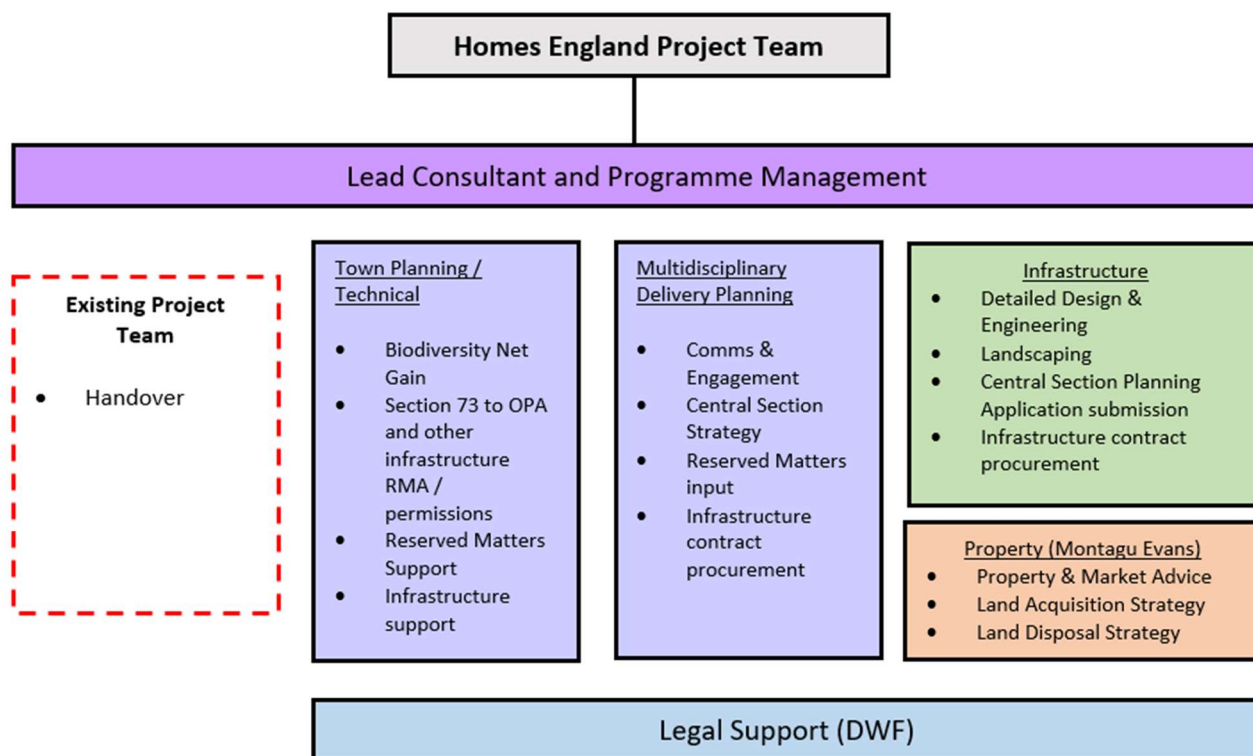
At each review point, the appointed consultant will be required to demonstrate how they have delivered against project requirements in line with forecast spend and the milestones and delivery targets that have been agreed with the successful consultant during inception.

- **Poor Performance Meeting**

These meetings will hopefully not be required. However, if poor performance is repeated following escalation to the Supplier's Key Personnel to resolve the issue, as required in the Framework Management Schedule of the Framework Contract, the Framework Manager must be notified, and Homes England may call for a Poor Performance Meeting. Beforehand, Homes England will present areas of concern so that the Supplier and Homes England can discuss what happened and why, what will be done to prevent it happening again and how matters will improve. The Supplier subject to such a meeting would be expected to outline in writing in a Rectification Plan afterwards what improvements/modifications they will be putting in place. There will be a maximum of two Poor Performance Meetings before termination of the commission.

8. Project Team Structure and Responsibilities

An indicative project structure is shown below (responsibilities for the multidisciplinary consultant are shown in purple). A full list of tasks that form part of this commission are set out later in this document.



Homes England Project Team – is headed up by Graham Hyslop – Project Director. Day to Day Homes England Project Leads are Louisa Henry and Nicholas Milner with support from wider Homes England internal teams as required. Rob Morley is the Homes England lead on the infrastructure delivery and management of contractors and their consultants.

Existing Project Team – Homes England will retain existing contracts outside of the Lead Consultant services, some with project management, such as RegenCo’s services for the infrastructure contracts of the above EBLR and WLR and eastern neighbourhood centre primary school. These will continue at least until the end of completion of the current phase of road construction. Homes England will also retain the current property services of Montagu Evans in line with their contract. Legal services are being provided by DWF and will continue according to the terms of their contract.

Legal – the Homes England Project team are supported by Homes England’s legal team led by Isabella Freeman – General Counsel and have appointed external legal advisors (DWF) who will continue to support the project as required.

External Delivery Partners – in confirming the deliver strategy and bringing forward the early development phases, it will be necessary to work with a number of external delivery partners on progressing the delivery of essential infrastructure in line with the overall project programme.

The appointed consultant is expected to work with the appointed existing project and legal teams as required to secure successful outcomes.

9. Risks

A full risk register will be provided to the winning supplier upon appointment. A summary of the key risks is below:

FY21/22

- Monitoring and delivery of key infrastructure items, particularly the EBLR and WBLR, and utilities, within cost and programme
- Required changes to planning conditions require amendments within the Ancient Woodland Buffer Zone
- The provision and amendments of ecology licenses must be agreed with Natural England
- Monitoring and management related to the delivery of the primary and secondary schools, including liaison with key stakeholders, including WSCC, UKPN and DfE

FY22-30

- Further monitoring and delivery of key infrastructure items, including utilities, within cost and programme
- Management of the public transport provision, and legal implications
- Achieving planning and statutory approvals for Phase 1B and 1C within the programme
- Obtaining approval for the business case and receiving the necessary funding for estimated spend
- Deviations from the existing OPA, for instance the Drainage Strategy or EIA
- Highways adoption agreements in a timely and reasonable manner, particularly if not resolved prior to contractor appointment
- Newts, Dormice or other ecology constraints impact on infrastructure and development plot programme and design

10. Payment

It is assumed that payment of fees will be made on a monthly basis. Agreement of an invoicing process will be required including review and approval of draft invoices (with time narrative) prior to issuing final invoice for payment. A full fee forecast will be required including monthly updates.

11. Budget

A Resource and Pricing Schedule will be required. An allowance for expenses should be included as part of the overall fee proposal. It is anticipated that fees will be paid monthly, up to the satisfactory completion of specific milestones/tasks/packages of work. The following gives an example of how this is anticipated to work – bidders are expected to break down each element including team members and fixed fees:

Milestone/ work package	Duration	Outputs	Team member and time spent	Date of completion	Fee and invoice date
Task	XX days	Report / event	Name and days / hours	Date	£ amount and date

Other Requirements

12. Warranties and Liabilities

Warranties will be required for all reports provided by the selected professional services team in accordance with the Multidisciplinary Consultancy Framework documentation. These will be required to be assignable to Homes England and the preferred development partner and others (to cover other potential purchasers/funders/partners) so that they are able to rely on the information provided.

The liability limitation is as noted in the Multidisciplinary Consultancy Framework documentation. There will be no reduction in the liability cap due to the anticipated scale of this commission.

13. 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.

14. 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.

15. 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.

16. Health and Safety (if applicable)

The Project Execution Plan must recognize that Homes England takes health, safety and inclusion seriously and expects 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

17. Procurement Timetable

Stage	Timing
ITT issued to selected bidders	21 January
ITT clarifications deadline	2 February
ITT deadline	02 March
Evaluation of tenders	02 March – 16 March
Notification of successful bidders to be put forward to interview (if required)	18 March
Interviews of successful bidders (if required)	w/c 28 March
Notification of preferred bidder	01 April
10 day standstill period	14 April
Inception briefing	TBC

Please note, the above procurement timetable is subject to change. Any changes will be communicated via ProContract.

Part 2 - Instructions for Submitting a Response

1. General

- 1.1 The Further Competition deadline is **1700** on **02 March 2022** 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.
- 1.2 Suppliers **must** ensure that suitable provision is made to ensure that the submission is made on time. Any tender responses received after the Further Competition deadline shall not be opened or considered unless Homes England, exercising its absolute discretion, considers it reasonable to do so. Homes England, may, however, at its own absolute discretion extend the Further Competition deadline and shall notify all Suppliers of any change via ProContract.
- 1.3 **Please note all communications during the tender period will be via the ProContract website. All Suppliers that have registered their interest for the Procurement will receive a direct email notification from ProContract on any updates via the Suppliers registered email address. No approach of any kind should be made to any other person within, or associated with, Homes England. It is the Suppliers responsibility to check the ProContract website for any updates to the Procurement process. No claim on the grounds of lack of knowledge of the above mentioned item will be entertained.**
- 1.4 The Supplier should check the Further Competition ITT for obvious errors and missing information. Should any such errors or omissions be discovered the Supplier must send a message via the messaging function on ProContract. No alteration may be made to any of the documents attached thereto without the written authorisation of Homes England. If any alterations are made, or if these instructions are not fully complied with, the tender response may be rejected.
- 1.5 All clarification requests must be sent using ProContract no later than 5 working days before the Further Competition deadline shown on ProContract. Any queries submitted after this may not be answered. Homes England will respond to clarifications as soon as practicable.
- 1.6 Suppliers should specify in their clarification questions if they wish the clarification to be considered as confidential between themselves and Homes England. Homes England will consider any such request and will either respond on a confidential basis or give the Supplier the right to withdraw the clarification question. If the Supplier does not elect to withdraw the question and Homes England considers any clarification question to be of material significance, both the question and the answer will be communicated, in a suitably anonymous form, to all prospective Suppliers who have responded. If Suppliers consider that page limits set

out in Section 20 (Evaluation Criteria) are insufficient to provide the information required by the question then a clarification request should be raised. No guarantee can be given that the page limit will be increased.

1.7 Tender responses must not be accompanied by statements that could be construed as rendering the tender response equivocal and/or placing it on a different footing from other Suppliers. Only tender responses submitted without qualification strictly in accordance with the Further Competition ITT (or subsequently amended by Homes England) will be accepted for consideration. Homes England's decision on whether or not a tender response is acceptable will be final.

1.8 Tender responses must be written in English.

1.9 Under no circumstances shall Homes England incur any liability in respect of this Further Competition or any supporting documentation. Homes England will not reimburse the costs incurred by Suppliers in connection with the preparation and submission of their tender response to this Further Competition.

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

2. Quality

2.1 A Response Form template has been provided in Part 2 to respond to the Quality questions detailed in Section 20 (Evaluation Criteria). The Response Form must be **completed and returned** as part of the tender response.

2.2 Suppliers must provide information on proposed staff in the Response Form and Resource and Pricing Schedule provided in Part 2. If the Supplier is a consortium or intends to sub-contract the Services, in whole or in part, then it should specify precisely in the Resource and Pricing Schedule which economic operator shall perform the Services (or parts thereof).

3. Pricing

3.1 A Resource and Pricing schedule has been provided with this Further Competition ITT which must be completed and returned as part of the tender response.

3.2 The pricing approach for this Further Competition is via defined budget range.

3.3 The list of activities in the Resource and Pricing Schedule is not exhaustive and there may be additional duties/services required that will emerge as work is undertaken. This commission may be extended on client instruction to cover such matters as arise, based on a time charged fee schedule completed in the

tender response. The commission will only be extended if the services relate to the original objective of the overall call off contract.

- 3.4 Suppliers are reminded that day rates for all individuals must be the agreed Framework Contract rates unless discounted rates are offered and will be used for all of the services.

4 Evaluation

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

5 Documents to be Returned

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

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

6 EVALUATION CRITERIA

Quality will account for 60% 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	Resourcing the Project Clear explanation of project team structure, including key	As part of your submission, please include: <ul style="list-style-type: none"> A detailed-level summary (included within the page count) of a minimum of two similar commissions that you have previously undertaken that incorporate the 	20%

	<p>accountabilities, experience and reporting structure, how key interfaces will be managed and supported by recent experience</p> <p><i>Maximum page limit = 2 pages (excluding CVs for identified team members)</i></p>	<p>project requirements and where team collaboration, infrastructure coordination and placemaking were priorities and successful outcomes secured</p> <ul style="list-style-type: none"> • Identify clear project team structure and key accountabilities. Who will undertake the commission and why have they been chosen? • Who will be responsible for reporting to the Client and what format will this take? • Demonstrate recent experience of lead team members on similar projects • Examples of where the team as a whole has worked together previously on similar schemes • Level of resourcing / cost for each task – taken from supporting Resource Pricing Schedule • Show how you will meet equality and diversity requirements set out by your company and Homes England’s policies (https://www.gov.uk/government/organisations/homes-england/about/equality-and-diversity) • An indication of anticipated meeting attendance required to achieve the outcomes • Supported by CVs for key members of staff 	
2	<p>Understanding of Project Requirements</p> <p>What do you envisage as being the key challenges and risks relating to the phased delivery of the Northern Arc project? How can these risks be mitigated? Please support your answer with relevant examples where your team has added value to past projects that involved phased</p>	<ul style="list-style-type: none"> • Describe key challenges and risks for this Northern Arc project • Outline how you would approach the project to mitigate the risks, inform the phased delivery and identify opportunities to add value • How would you manage changes to the OPA, where amendments are required, without causing delay to delivery and implementation? • How would you manage competing priorities from stakeholders? • Schedule of services to be delivered • Other commentary on the brief 	25%

	<p>infrastructure delivery. Please provide examples for time critical on-site highways schemes that have supported strategic development sites.</p> <p><i>Maximum page limit = 5 pages</i></p>	<p>Refer to relevant experience in past projects, including:</p> <ul style="list-style-type: none"> • Project title and date of involvement • Client and contact details • Your role, in what capacity you were commissioned • Specific challenges and risks you encountered and the specific mitigation, actions or interventions you made that secured a positive outcome and added value • Highlight any particular stakeholder risks and examples of how you have managed complex stakeholder relationships • How this would inform how you would approach the Northern Arc project 	
3	<p>Programme</p> <p>Please provide an overview of your approach to the design, detailed planning application, procurement and management for the delivery of the infrastructure scheme. Within your answer, please set out your approach to stakeholder management and community engagement and how information, resources and actions will be managed within the project team.</p> <p><i>Maximum page limit = 3 pages</i></p>	<ul style="list-style-type: none"> • Summarise the approach you propose for project management to meet the project objectives and milestones • Describe key project tools that you consider appropriate to manage risk, information, resources and actions within the project team and stakeholders • Identify risks that may affect the programme or costs, what impact they may have, and how you will proactively mitigate them <p>Refer to relevant experience in past projects including:</p> <ul style="list-style-type: none"> • Project title and date of involvement • Client and contact details • Your role, in what capacity you were commissioned • How you will use the relevant tools, knowledge, experience and learning you gained managing previous projects to advance the Northern Arc 	15%
4	<p>Dealing with contractual disputes</p>	<ul style="list-style-type: none"> • Summarise your ability to bring in various technical support as required to support the client in disputes • How you manage disputes under the NEC contract 	15%

	<p>Please provide an overview of your approach to dealing with contractual disputes with contractors to provide the best financial and/or delivery outcome for a project.</p> <p><i>Maximum page limit = 3 pages</i></p>	<ul style="list-style-type: none"> • How you would interface with the clients legal representation to deal with disputes • Supported by case studies of disputes (can be anonymised if appropriate) where you have achieved beneficial outcomes for a project following a contractual dispute 	
5	<p>Design and placemaking</p> <p>Please provide details of how you will integrate different and sometimes competing design requirements into a unified integrated design to deliver the project outcomes consistent with the varying client and stakeholder requirements</p> <p><i>Maximum page limit = 4 pages</i></p>	<ul style="list-style-type: none"> • Taking into account technical constraints that may be posed from civil, transport, geotechnical engineering design requirements • Ecology considerations and climate goals • Providing a consistent placemaking and urban design outcome that is adoptable by individual housing developers • How you will consider the existing design guidelines relative to the existing scheme and incorporate these into your design • Highways adoption design requirements and how this may conflict with other design goals • Dealing with stakeholder requirements that may conflict with other design goals • Supported by examples and/or case studies, particularly with reference to Design Codes and phased implementation 	25%

Price will account for 40% 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	40%

7 Worked Example

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

Bidder	Question	Score out of 5	Weighting	Weighting Multiplier	Weighted Score	Total Weighted Score
Supplier A	1	3	20%	4	12	60
	2	3	25%	5	15	
	3	2	15%	3	6	
	4	4	15%	3	12	
	5	3	25%	5	15	
Supplier B	1	5	20%	4	20	68
	2	3	25%	5	15	
	3	3	15%	3	9	
	4	3	15%	3	9	
	5	3	25%	5	15	
Supplier C	1	2	20%	4	8	40
	2	2	25%	5	10	
	3	2	15%	3	6	
	4	2	15%	3	6	
	5	2	25%	5	10	
Supplier D	1	2	20%	4	8	n/a (fail)

	2	1	25%	5	n/a	
	3	3	15%	3	9	
	4	2	15%	3	6	
	5	2	25%	5	10	

* in the example above Supplier D'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 40)
Supplier A	350	$350/350 = 100\%$	$100\% * 40 = 40$
Supplier B	700	$350/700 = 50\%$	$50\% * 40 = 20$
Supplier C	500	$350/500 = 70\%$	$70\% * 40 = 28$
Supplier D	250	n/a	n/a

Worked example of Overall Score and Ranking

Bidder	Total Quality Score	Price Score	Total Score	Ranked Position
Supplier A	60	40	100	1
Supplier B	68	20	88	2
Supplier C	40	28	68	3
Supplier D	n/a	n/a	n/a	n/a

Part 3

3.1 RESPONSE FORM

Framework:	Multidisciplinary Framework
Project Title:	Northern Arc, Burgess Hill
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 whilst making reference to the evaluation section above. Homes England is happy for Suppliers to respond to this ITT in their own format as long as they address all the questions above and do not go over the page limits for each question as set out in the evaluation section. Any text beyond this will be ignored and will not be evaluated.

3.2 RESOURCE AND PRICING SCHEDULE

Excel spreadsheet to be embedded by Supplier in response.

Appendix 1 – Detailed Technical Scope

Appendix 2 – Development Phasing and Specification Plan

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