



Homes
England

Making homes happen

Homes England Multidisciplinary Framework 2019-2023 Further Competition Invitation to Tender

Worcestershire Parkway: Masterplanning, design and sustainability

Issue Date: 6/9/2021

ProContract Identification Number: DN567877

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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 Requirements

- 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 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

The three local authorities of Malvern Hills District, Worcester City and Wychavon District are currently reviewing The South Worcestershire Development Plan (SWDP). The Plan's Preferred Options were published in November 2019 and the Councils are working towards submitting the plan for examination during 2022.

As part of its growth strategy, the Plan identifies 3 key strategic allocations which include a new settlement at Worcestershire Parkway. The new settlement will be based on Garden Community principles and is planned to deliver the following by 2041:

- 5,000 homes (with an additional 5,000 beyond the plan period)
- 50ha Employment land – most of which will be located close to M5 Junction 7
- A town centre comprising retail, commercial and community uses
- 2-3 neighbourhood centres
- One secondary and three primary schools
- Health infrastructure and community facilities
- Leisure centre and formal sports facilities
- A minimum of 40% Green Infrastructure

Homes England acquired a freehold site in January 2021 totalling 22 hectares at the heart of the proposed scheme. Homes England are promoting this site for allocation as part of the wider proposed settlement.

Progress to date

The South Worcestershire Infrastructure Delivery Plan (SWIDP) was last published in October 2019 to support the South Worcestershire Development Plan Preferred Options stage and is currently being updated by Worcestershire County Council, supported by Arup, as the plan progresses to submission stage. The Worcestershire Parkway landowners are currently working with the Council and other stakeholders on the evidence base for the allocation.

Worcestershire Parkway new settlement: Homes England MPP High Growth and New Settlements are supporting the South Worcestershire District Councils (SWDC) deliver their main strategic housing priority, a 10,000 homes new settlement at Worcestershire Parkway.

Homes England land promotion: In January 2021 Homes England acquired a site at the heart of the development adjacent to the new Parkway Train Station. The site will deliver 500 homes and half of a new Town Centre for the settlement.

This commission will support and build upon the emerging Worcestershire Parkway masterplanning and design work. This will include an analysis of the sustainability ambition including within the emerging Policy.

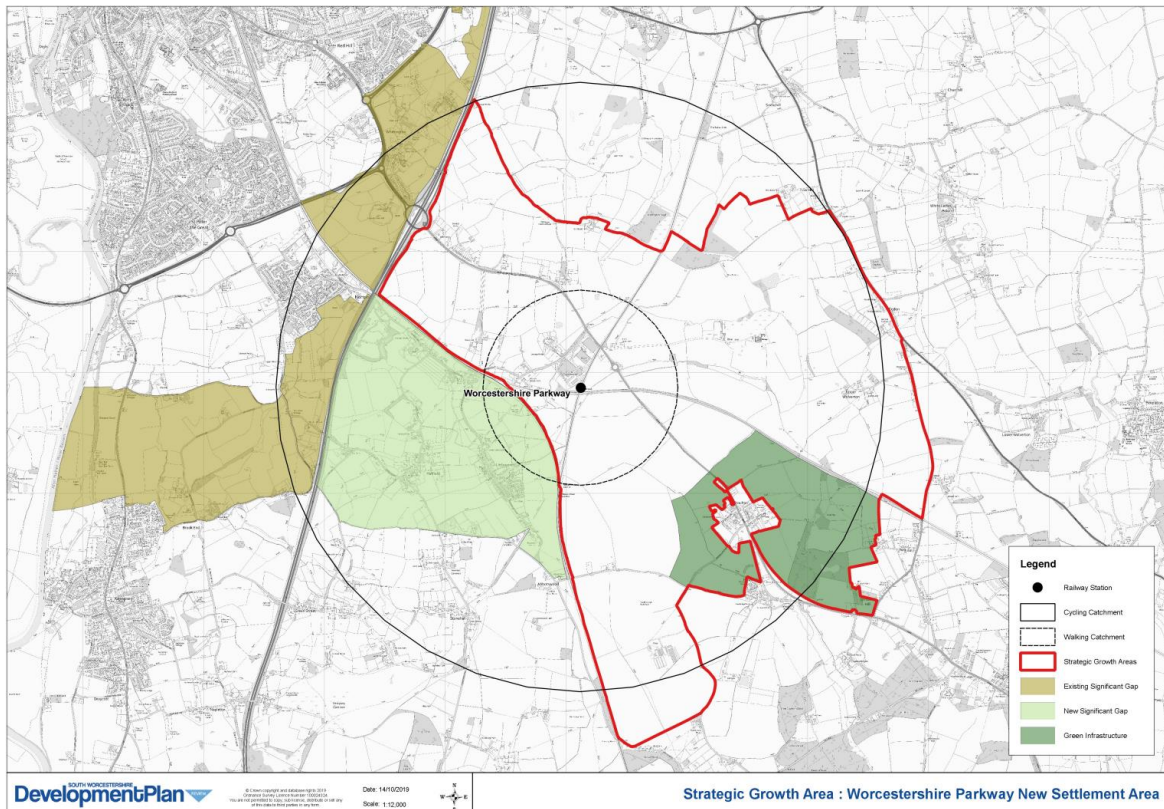
2. Objectives

- 1) Working with key partners support the emerging Worcestershire Parkway masterplanning and design work
- 2) Explore the deliverability and applicability of the sustainability ambition contained within Worcestershire Parkway including the emerging policy. This work will help ensure that the sustainability ambition and proposals are proportionate and deliverable.

3. Key deliverables

- 1) Working in conjunction with the South Worcestershire District Councils (SWDC), key landowners and Design Midlands support and advise on the emerging vision, principles and masterplanning at Worcestershire Parkway.
- 2) This would involve preparation for and participation at a 2-day workshop led by Design Midlands (details tbc) Key outputs would be a refreshed vision, production of a set of overarching principles that can be used in the masterplanning work and the agreement of a name for the new settlement.
- 3) This work should also inform the establishment of a website for the site to deliver key messages in a consistent way.
- 4) Focus to be placed on incorporating delivery and viability recommendations with an emphasis on understanding the costs and impact on the timescale for delivery
- 5) Work to explore options and recommend an appropriate Design Guidance approach for Worcestershire Parkway
- 6) Analyse how the emerging masterplanning and design work could enable the acceleration of housing delivery at Worcestershire Parkway
- 7) An assessment of the sustainability ambition emerging at Worcestershire Parkway including an exploration of the proposed concept of the 20-minute neighbourhood
- 8) Study confirming if the proposals conform with the latest planning policy advice
- 9) An assessment of the potential impact of the sustainability ambition on financial viability and timescale for delivery
- 10) Production of initial targets to help measure the success of the sustainability ambition

4. Site Information



5. Indicative Programme

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

| Key Delivery Milestones | Anticipated Date |
|-------------------------|------------------|
| Tender deadline | 8.10.21 |
| Commencement Date | 22.10.21 |
| Interim Report | 17.12.21 |

| | |
|-----------------|---------|
| Completion Date | 28.1.22 |
|-----------------|---------|

6. Management

The main point of contact for this commission for the Supplier will be Neil Iredale, Homes England who will manage the Supplier on a day-to-day basis.

The Supplier will be expected to attend an inception meeting, three review meetings, plus a meeting to finalise reports. Some of these meetings may be undertaken remotely. Representatives from Homes England Multi-Functional Team (MFT) will attend these meetings alongside representatives from South Worcestershire District Councils.

Meeting Requirements:

- **Start-up meeting**

An inception meeting is to be held in the week commencing 22.10.21. Representatives from Homes England MFT will attend the meeting alongside representatives from South Worcestershire District Councils. The consultant should identify who from the consultant team will attend the inception meeting.

- **Review meetings**

Two review meetings to be held; 2 weeks and then 4 weeks after commencement. A further meeting to discuss the Interim Report and then a final meeting to discuss the Final Report. Again, representatives from Homes England MFT will attend alongside representatives from South Worcestershire District Councils. The consultant should identify who from the consultant team will attend.

- **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.

7. Key staff

Tenderers must confirm the proposed study team, identifying the skills and experience of key staff relevant to this commission. It is anticipated that the study team will include highly experienced advisers familiar with:

- New settlement masterplanning and design
- An understanding of the viability and deliverability of New Settlements
- Options available to introduce appropriate design guidance to a new settlement that has ambitions to deliver against Garden Community principles
- Analysis of sustainability ambition including knowledge of the latest planning advice
- An understanding of the potential impact of sustainability ambition on viability and speed of delivery

Case studies of new settlement development experience and CVs should be provided for the study team and key staff respectively.

8. Payment

Fees will be paid upon satisfactory completion of the works. Interim payments may be considered where deemed appropriate.

Other Requirements

9. 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.

10. Budget

The indicative budget range for this commission is £40,000 to £45,000.

11. 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.

12. Confidentiality

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

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

Part 2 - Instructions for Submitting a Response

1. General

- 1.1 The Further Competition deadline is **1:00pm on 8/10/21** 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.

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

out in Section 6 (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.

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

1.7 Tender responses must be written in English.

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

1.9 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 3 to respond to the Quality questions detailed in Section 6 (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 3. If the Supplier is a consortium or intends to sub-contract the Services, in whole or in part, then it should specify precisely in the Resource and Pricing Schedule which economic operator shall perform the Services (or parts thereof).

3. Pricing

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 a fee proposal

Suppliers should submit day rates in addition to the Resource and Pricing Schedule, with the Framework Rates as the maximum for each grade.

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 6 (Evaluation Criteria) below and the scoring approach is detailed in Section 7 (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 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 CV's for staff proposed to undertake this commission (no more than 2 pages each)

6 EVALUATION CRITERIA

Quality will account for 50% 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 | Proposal / Understanding of Project Requirements | <ul style="list-style-type: none"> Statement outlining method and approach explaining how the commission will be undertaken | 25% |

| | | | |
|---|---|--|-----|
| | <p>Understanding the nature of the commission</p> <p>Robust and appropriate methodology proposed for supporting Masterplanning, Design and Sustainability</p> | <ul style="list-style-type: none"> • Schedule of services to be delivered • Information on other Supplier input that may be required • Identification of other information that may be required • Where relevant identification of areas of innovation • Where appropriate identify the potential impact of external influences and stakeholders • Areas where value engineering could be considered to achieve best value. • Other commentary on the brief • Supported by relevant examples, where applicable, demonstrating how they are relevant to the approach proposed | |
| 2 | <p>Staff</p> <p>Relevance of qualifications and experience of team members that will be utilised to achieve the commission outputs along with a breakdown of the time proposed for each team member to be allocated to this commission</p> | <ul style="list-style-type: none"> • Who will undertake the commission? • Identify key members of staff and allocation to the required services • How much time will they devote to it? • Supported by resourcing information provided in Resource and Pricing Schedule • Supported by CVs for key members of staff | 15% |
| 3 | <p>Management and Communication</p> <p>Details of the lead consultant who will manage delivery of this commission.</p> | <ul style="list-style-type: none"> • How will the commission be managed? • Who will be responsible for reporting to the Client? • Who will manage the team? • Where subcontracting arrangements are in place, who will manage the contract? | 5% |

| | | | |
|---|---|---|----|
| | Proposed methodology for communicating with Homes England in respect of delivering the commission, including meetings | <ul style="list-style-type: none"> • Communication strategy • Supported by relevant examples, where applicable, demonstrating how they are relevant to the approach proposed | |
| 4 | <p>Programme</p> <p>A project plan setting out key stages, workstreams, tasks and milestones for delivering the commission recognising priorities.</p> | <ul style="list-style-type: none"> • When will the commission be complete? • When will key milestones be complete? • What is the programme for the required services? • Are the programme dates we have given achievable? • Identify risks which may affect the programme or costs, what impact they may have, and any mitigation. | 5% |

Price will account for 50% 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 | 50% |

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 | 25% | 5 | 15 | 32 |
| | 2 | 4 | 15% | 3 | 12 | |
| | 3 | 3 | 5% | 1 | 3 | |
| | 4 | 2 | 5% | 1 | 2 | |
| Supplier B | 1 | 5 | 25% | 5 | 25 | 34 |
| | 2 | 4 | 15% | 3 | 12 | |
| | 3 | 4 | 5% | 1 | 4 | |
| | 4 | 3 | 5% | 1 | 3 | |
| Supplier C | 1 | 2 | 25% | 5 | 10 | n/a (fail)* |
| | 2 | 1 | 15% | 3 | n/a | |
| | 3 | 2 | 5% | 1 | 2 | |
| | 4 | 2 | 5% | 1 | 2 | |

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

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

| Bidder | Form of Tender price | Lowest price/Supplier's price (as %) | Price Score (out of 50) |
|------------|----------------------|--------------------------------------|-------------------------|
| Supplier A | 350 | $350/350 = 100\%$ | $100\% * 50 = 50$ |
| Supplier B | 700 | $350/700 = 50\%$ | $50\% * 50 = 25$ |
| Supplier C | 250 | n/a | n/a |

Worked example of Overall Score and Ranking

| Bidder | Total Quality Score | Price Score | Total Score | Ranked Position |
|------------|---------------------|-------------|-------------|-----------------|
| Supplier A | 32 | 50 | 82 | 1 |
| Supplier B | 34 | 25 | 59 | 2 |
| Supplier C | n/a | n/a | n/a | n/a |

Part 3

3.1 RESPONSE FORM

| | |
|---|---|
| Framework: | Multi-disciplinary Framework |
| Project Title: | Worcestershire Parkway: Masterplanning, design and sustainability |
| ProContract Identification Number: | [insert] |
| Supplier: | [insert] |
| Date: | [insert] |

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

1. Proposal / Understanding of Project Requirements

2. Staff

3. Management and Communication

4. Programme

3.2 RESOURCE AND PRICING SCHEDULE

Excel spreadsheet to be embedded by Supplier in response

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0300 1234 500

gov.uk/homes-england