**2018 – 2022 Property Professional Services Framework (2018/S 005-007230)**

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

**Langley SUE – Property Advisory and Agency Services**

**Issue Date: 19/05/2022**

**ProContract Identification Number: DN596867**

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Introduction

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

We ask you to respond to the questions detailed in Part 2, Section 6 (Evaluation Criteria) using the [Response Form](#_RESPONSE_FORM) and to return the Response Form and Resource and Pricing Schedule in Part 3 with your tender.

This Further Competition ITT is divided into 3 parts:

**Part 1 – Commission Requirement**

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

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

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

**Part 3 – Standard Forms**

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

# Part 1 - Commission Requirements

# Commission Background

# Strategic Context

1. Homes England set out a five-year strategic plan in 2018:

<https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/752686/Homes_England_Strategic_Plan_AW_REV_150dpi_REV.pdf>

1. In line with our organisational strategic objectives, we have a mandate to:

* Provide expert support for priority locations, helping to create and deliver more ambitious plans to get more homes built.
* Promote better design and higher quality places.
* Understand the need and opportunity for investment in land, infrastructure to unlock the market and support affordability of housing.

1. As part of the Agency’s 5-year plan, a number of significant acquisitions of large-scale stalled sites have been made, including the acquisition of circa 94.68 ha (234 acres) of land capable of delivering over 2,200 homes at **Langley Sustainable Urban Extension (SUE)** in 2021.
2. Homes England is seeking to appoint a property/ development consultant to provide ongoing strategic and detailed property advice, to work with Homes England in the preparation a robust disposal strategy for residential-led, mixed-use development on the site, and to act as a critical friend to Homes England in their role as a member of the Langley Sutton ColdfieldConsortium (further details below). The consultant will also take a lead role in the disposal of Phase 1 land via the Homes England Dynamic Purchasing System (DPS).
3. Homes England has a commitment to maintaining high quality throughout the design and delivery process through to disposal and require the property/ development consultant to work closely with the wider multi-disciplinary consultant team to ensure that Homes England objectives are promoted in a consistent manner across all workstreams.
4. Homes England anticipates that bidders will put forward a bespoke team of leading practitioners to meet the specific requirements of this brief.
5. The appointment of a property agent to advise on the disposal of later phases of Homes England land interests via the Dynamic Purchasing System DPS) will be undertaken as a separate appointment via a new tendering exercise at the appropriate time. Homes England reserves the right to extend this appointment to include additional phases of development if required.
6. The deadline for submission is **Thursday 30 June at 12 PM.**  Please note, ProContract will provide the most up to date information regarding timescales.

# Langley SUE

# Site/ background

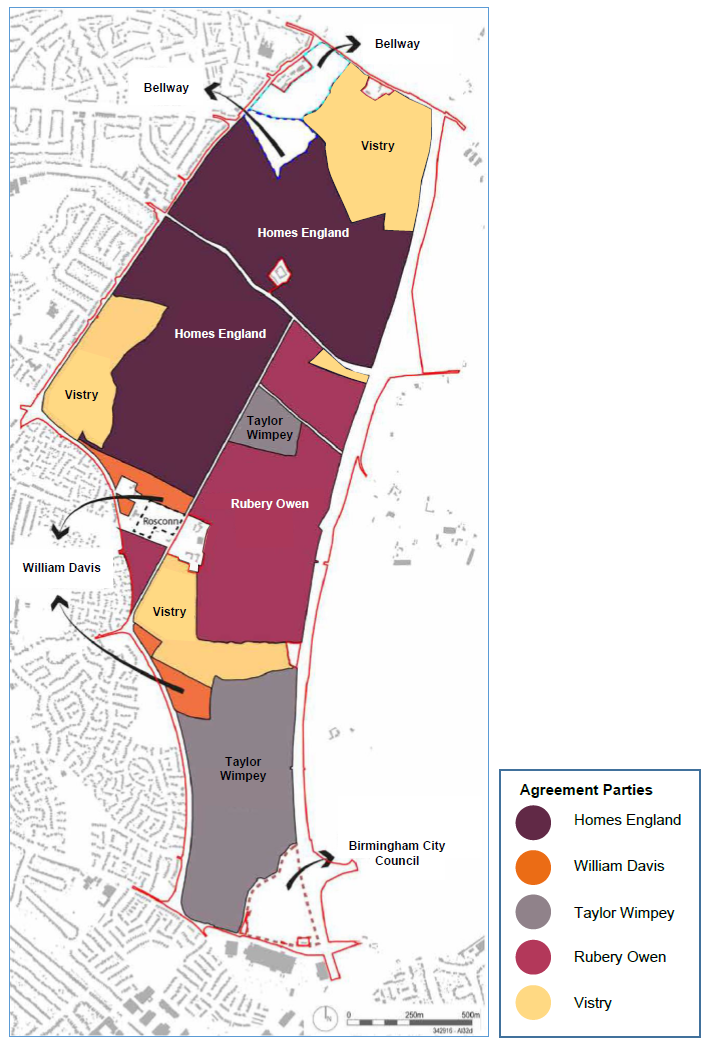
1. The Langley Sustainable Urban Extension (SUE) is located adjacent to Sutton Coldfield and is a major residential development, covering approximately 264 hectares (652 acres).  Situated 2 miles east of Sutton Coldfield and 8 miles northeast of Birmingham, and in close proximity to the A38, M42 and M6 Toll, the has excellent connectivity with Birmingham and the motorway network.
2. The Langley SUE represents an unparalleled opportunity to not only deliver circa 5,500 new homes, but to establish a new sustainable community, including schools and community facilities, and set a national benchmark for high quality development at this scale, bringing benefits not only to new residents, but to the wider area of Walmley, Sutton Coldfield and beyond.
3. The SUE will be primarily delivered by four major landowners and developers, Homes England, Taylor Wimpy, Vistry and Rubery Owen, acting in partnership through a Consortium Collaboration Agreement, which will set out the terms and structure for joint delivery of the project.
4. Homes England’s role in delivering this vision is two-fold. Firstly, Homes England has acquired at least 36% of the land within the Langley SUE area. Homes England will therefore have a direct role in delivering homes and infrastructure within land it owns. Homes England will deliver circa 2,200 homes within land it owns, with our aim that at least 35% of these are genuinely affordable.
5. Secondly, as part of the Consortium, Homes England will collaborate with the other members to develop the respective planning application submissions, design codes and shared delivery model for major infrastructure that will underpin the delivery of the overall vision for the SUE.
6. Langley SUE was released from the green belt and allocated in the Birmingham Development Plan in 2017. The Langley SUE Supplementary Planning Document (SPD) was published in 2019, the main focus being the delivery of a comprehensive, sustainable and high-quality development. The site allocation is illustrated in the plan below:

**Figure 1 Langley SUE allocation boundary (Source: Langley SUE SPD)**



1. The SPD includes a requirement for a comprehensive site-wide phasing and infrastructure plan, which was proving difficult due to the involvement of multiple landowners and promoters. Homes England acquired circa 94.68 hectares (234 acres) in 2021, circa 36% of the wider site, and has subsequently worked closely with the landowners/ promoters in the negotiation of a Pre-Collaboration Agreement that sets out the intention for the terms and structure for joint delivery of the project. The members of the Langley Sutton ColdfieldConsortiuminclude Homes England, Taylor Wimpey, Vistry Homes, William Davis, and Rubery Owen, representing circa 90% of the wider site by area. The ownership/ promotion boundaries of the site are identified on the plan below:

**Figure 2 Land ownership plan**





# Planning Status

1. The site is allocated for housing in the Birmingham Development Plan, which was adopted in 2017, and represents 10% of Birmingham City Council’s housing supply plan period. The Langley SUE SPD was adopted in 2019 to guide development on the site.
2. The Langley Consortium has since worked collaboratively to produce a site wide masterplan that sets out a deliverable vision for the site and submitted an outline planning application on the basis of this masterplan in December 2021 (Planning Application Number 2021/10567/PA). In accordance with the SPD, the outline planning application is for up to 5,500 dwellings and up to 70,000 m² of mixed -use floorspace to include:

* Affordable housing.
* Mixed-use centre (District Centre).
* Two local centres (Community Hubs).
* Education provision (early years, 3 primary schools, 1 secondary school and sixth form);
* Community facilities (including health, extensive public open space, sports and play facilities).
* Two new access points to the A38.
* Highway improvement and mitigation.
* Public transport provision.
* A network of walking and cycling routes.

# Homes England Strategic Vision

1. Homes England’s Strategic Vision is for Langley SUE to not only deliver circa 5,500 new homes, but to establish a new sustainable community, including schools and community facilities, and set a national benchmark for high quality development at this scale, bringing benefits not only to new residents, but to the wider area of Walmley, Sutton Coldfield and beyond.
2. Homes England will look to achieve this vision by:

* Delivering the right infrastructure, at the right time, that is in the right place, is safe, accessible, legible, beautiful and fit for the future, and underpins the creation of great places.
* Delivering a series of larger un serviced parcels for development on its own land by high quality developers including SMEs as well as larger and well-established national / regional housebuilders.
* Creating the opportunity on land Homes England owns for smaller, appropriately serviced plots for smaller developers, custom and self-builds and new market entrants.
* Ensuring that our approach to disposing of parcels of land ensures the delivery of a successful, sustainable and commercially facing range of different tenures, traditional and non-standard products to create a varied and long-lasting community and sense of place
* Working with the Consortium to create a locally distinctive and characterful place, that builds on and connects strongly with the local community.
* Delivering a commercially successful series of retail, leisure, education and non-residential spaces that create a truly thriving and sustainable community.
* Creating sustainable and ambitious long-term partnerships and stewardship arrangements that incorporate and become exemplars in co-design and community management models, delivering a community-based vehicle to take stewardship of key assets in perpetuity.
* Incorporating and promoting innovation and aspiration in new technologies and approaches to sustainable construction, design and infrastructure to ensure the development built now will be fit for future generations.
* Creating a well-connected site which encourages sustainable methods of movement and integration with the existing local community.

# Development and Infrastructure Delivery

1. Homes England’s role in delivering this vision is two-fold. As landowner, Homes England has a direct role in delivering circa 2,200 homes and associated infrastructure within the land it owns.
2. Secondly, as part of the Consortium, Homes England will collaborate with the other consortium members to develop the respective planning application submissions, design codes and shared delivery model for major infrastructure that will underpin the delivery of the overall vision for the SUE.

# Site wide delivery and infrastructure

1. The SUE will be primarily delivered by four major landowners and developers, namely, Homes England, Taylor Wimpy, Vistry and Rubery Owen, acting in partnership through a Consortium Collaboration Agreement, which will set out the terms and structure for joint delivery of the project.
2. The consortium will have responsibility for the delivery of site wide infrastructure works through a form of contractual arrangement between consortium members, the format of which is yet to be agreed. This ‘Project Infrastructure Agreement’ will have responsibility for delivery of the following packages of works:

* Site clearance, remediation and groundworks
* Section 38 and 278 highway works along with relevant adoptions
* Servicing and utilities
* Masterplanning of blue and green infrastructure to support planning requirements
* Drainage, pumping and sub stations
* Site wide design codes.

1. The consultant team appointed to advise on these works is set out at Section 1.4 below.

# Delivery of Homes England land

1. As landowner Homes England will also have responsibility for the delivery of infrastructure and development on its own land. An initial approach to phasing principles for the Homes England land has been developed based on the current phasing plan for site wide infrastructure delivery and is set out below.

Draft phasing plan

1. The outline planning application contains a broad phasing strategy for both strategic infrastructure and development plot parcels, however, phasing is currently being reviewed by the Consortium as part of the strategic infrastructure design work and may also be influenced by responses received during the determination of the outline planning application.
2. Parcel capacity testing of Agency landholdings is currently underway and the results will be shared with the appointed consultant. A final Phasing and Delivery Plan which fixes plot release timings and confirms capacities will be agreed between consortium members as part of the Post Planning Collaboration Agreement currently being prepared. The agreed phasing plan will also form part of the outline planning consent.
3. Proposals for the District Centre and Community Hubs will be prepared through a separate ‘District Centre’ workstream with its own consultant team and will need to be developed to incorporate a mix of uses including schools, healthcare, retail / commercial, community buildings and associated residential development. The District Centre, Community Hubs and residential phases will need to be designed in accordance with the Building for a Healthy Life principles and incorporate co-design and careful consideration of Sustainability principles alongside Places and Homes for All. The two consultant teams working on each workstream will need to work together to ensure seamless design and integration across the District Centre, Community Hubs and wider residential scheme.
4. The initial phasing plan is summarised below and sets out at a high level a 15+ year disposal programme for Homes England ownership. Early phases of development comprise parcels fronting Springfield Road, that do not rely on the delivery of infrastructure works to open access to the ‘internal’ site to begin early delivery of the wider scheme. As set out above, phasing will be subject to refinement to respond to market advice and the developing requirements of the project. For instance, there is a requirement to consider the possibility of flexible phases that can be sized/ grouped to respond to:

* SME requirements
* Large phase disposals
* Custom build/ self-build plots

These should be considered alongside delivery and infrastructure requirements, which will have a direct impact on the flexibility of the phasing plan.

The current phasing plan is as follows:

**Plot HE1 –** Fronting Springfield Road, this parcel of land extends to 5.58 hectares (13.79 acres) and is identified as potential first phase of development comprising 208 units between 2024 and 2031. The site offers potential for early disposal of smaller parcels to SME developers to deliver an early and high-quality phase of development to drive quality and values across the site.

**Plot HE2 –** Also fronting Springfield Road, a 5.32 hectare (13.13 acre) parcel of land identified for potential delivery of circa 186 standard housing units between 2026 and 2032.

**Plot HE3 –** A parcel of land of 7.76 hectares (19.17 acres) for potential delivery of 334 units, given its proximity to the District Centre it is envisaged that this could comprise a mix of senior living and standard housing for delivery between 2031-2035.

**Plot HE4 –** The parcel size will depend upon requirements for the District Centre and mix of uses. Proposals for the District Centre and Community Hubs will be prepared through a separate ‘District Centre’ workstream, as previously discussed. Given proximity to the District Centre, Plot HE4 could be suitable for delivery of 350 PRS and senior living units between 2022 and 2036 to diversify residential typologies to avoid over-supply of market housing across the wider Langley SUE site.

**Plot HE5 –** 7.09 hectare (17.51 acre) parcel of land adjacent to the listed Langley Hall (listed building) for potential delivery of 261 units between 2031 and 2035. Given its proximity to Langley Hall, this parcel could be targeted towards SME developers to promote a high-quality scheme.

**Plot HE6 –** 9.86 hectare (24.37 acre) parcel of land for the potential delivery of 368 standard housing units between 2033-2037.

**Plot HE7 –** A parcel extending to 8.74 hectares (21.62 acres) for 381 standard housing units between 2037 and 2040.

**Plot HE8 –** A parcel of land extending to 3.22 hectares (7.96 acres) delivering 91 units between 2034 and 2035.

1. Please note draft phasing plan at Appendix A.

Draft disposal strategy

1. A key workstream for this commission is the development of a robust disposal strategy for Homes England land that is compliant with the Homes England Land Disposals Policy. As this is a long-term delivery project the need for some flexibility and disposals options will need to be carefully considered within the strategy prepared.
2. Accelerating housing delivery through diversification of the housing product remains an important ambition for Homes England, and the current draft disposal strategy for the Langley SUE is focussed on delivering a range of housing products across different tenures and property types. The consultant will be required to advise on appropriate site parcelling to attract a range of developer types including national/ regional housebuilders, SMEs, custom/ self-build and to deliver a range of property types and tenures to create a varied and long-lasting community and sense of place. The consultant will also provide commercial input to support the masterplanner in formulating the most appropriate split of affordable housing tenures for each plot to achieve the 35% affordable housing requirement.
3. Homes England expects, given the varied nature of housing typologies to be delivered on Homes England land, that it would be disposing of multiple parcels of land to different delivery partners at the same time to expedite delivery. The alternative is that Homes England disposes of larger parcels to developers with the option to obligate the delivery of SME parcels and self-build options within them, subject to Homes England policy and market testing. The nature and speed of these disposals will be developed in a balanced and sustainable way, complimentary to the needs of the wider development and market testing findings.
4. Homes England has stated an objective to bring in private sector expertise at the earliest possible stage, which will have a direct impact upon timescales for plot sales. Homes England will dispose of parcels of land via the DPS (or subsequent framework), and, using the Council’s adopted SPD, the planning application process, and the articles of the Consortium agreements (where relevant) this will help reinforce and build the requirements and ambitions of quality place making at Langley through the tender scoring process. This will also need to be balanced with the need to achieve best value and outcomes for the land.

# Consultant appointments

1. The successful consultant will be required to work closely with the consortium and Homes England consultant teams to ensure that Homes England objectives are promoted in a consistent manner across all workstreams. The consortium has appointed a consultant team to advise on site wide delivery, including preparation of the outline planning application, phasing, site wide infrastructure and preparation of Design Codes. This technical team includes the following appointments:

* **Ellipsis –**  Project management of all aspects of delivery from planning application stage through to completion.
* **WSP** – infrastructure and transport.
* **Savills** – Planning and urban design including site wide Design Codes.
* **EDP** – environmental.

1. For Homes England, we are currently looking to make the following direct key appointments:

* **Multi-Disciplinary & Masterplanning -** A consultant from the multi-disciplinary panel to provide technical support and advice, including site-specific masterplanning and preparation of site-specific Design Code/ Plot Passports. The consultant will also be appointed to prepare the Technical Pack for disposals, please note indicative list of Technical Pack requirements at Appendix B.
* **District Centre Advice -** This is a separate appointment from the property panel and will be a property-led, multi-disciplinary team to include urban design, retail & leisure and economic consultancy to provide specialist advice on the delivery of the District Centres and Community Hubs on Homes England land.
* **Property Agency / Disposals -** The appointment of a property agent to advise on the disposal of later Homes England phases via the Dynamic Purchasing System (DPS) may be undertaken as a new tendering exercise at the appropriate time.

1. The appointed property consultant will be required to work closely with all the consultants, but particularly the multi-disciplinary teams (both consortium and HE led) due to the need to understand site and phasing constraints and opportunities that support or hinder disposal of the land.

# The Services

1. The purpose of this Invitation to Tender (ITT) is to appoint a property / development consultant to provide support to Homes England in developing a robust disposal strategy that is aligned to and maximises achievement of our strategic vision and site wide objectives for our land ownership at Langley SUE. The consultant will then lead on disposal of the Phase 1 parcel of land (HE1) through the Homes England Dynamic Purchasing System (DPS). Please note that Homes England reserves the right to include the disposal of additional phases of its landholding within this commission.
2. The contract is anticipated to run for an initial period of 3 years, with the option to extend by a further 2 years in increments of 1 year, a total potential contract duration of 5 years, subject to an annual performance review.
3. Based on the above, Homes England will require the appointed consultant to undertake the key services listed below. This is not an exhaustive list and the consultant is requested to make any recommendations for amendments or additions in their return. Please note, we reserve the right to amend the scope of services to meet the requirements as the project progresses. This may result in the earlier stages exceeding agreed fee levels that could result in some of the later stages having to be removed from the commission. Please refer to Section 5.4 for further information.
4. Suppliers should provide an approach and fee quote for each element of Stages 1 to 6 of The Services listed below.
5. PLEASE NOTE: There is a Resource & Pricing Schedule at Appendix C. The Schedule lists out the services set out below (Stages 1 – 6). This table is to be completed for the purposes of the financial bid, and will also be scored for responding to the qualitative elements of the bid including appropriate allocation of resource.
6. Services under stages 1 to 3 are required for all Homes England landholdings, and stages 4 – 6 for Phase 1 land only (Plot HE1). Please see below a full breakdown of each stage of work with a relevant set of delivery outputs.

**Stage 1 – Masterplan Development**

1. Review Framework Masterplan and Visioning/ development work produced by the consortium to date, including outline planning application, and provide initial high-level views on strengths and weaknesses including site constraints /opportunities which support Homes England land disposals and overall delivery.
2. Preparation of detailed market report to underpin advice on masterplan development (focusing on HE land), including advice on values, phasing, tenure, development mix, market attractiveness, Homes England objectives, etc.
3. Working collaboratively and iteratively with the consortium and Homes England consultant team, and using the existing Framework Masterplan and Visioning/ development work as the basis, provide commercial input to support the development of evidence-based, commercially successful/ viable and market facing detailed masterplans and Parcel Codes \* that maximise the value and housing potential of the site. These should also maximise achievement of key Homes England policy objectives around MMC, SMEs, self-build, etc. (Please note, the planning application has been prepared and submitted by the consortium consultants and will evolve over coming months).
4. Review the draft site wide phasing plan prepared to date and provide advice on how this could be improved / amended for Homes England landholdings whilst retaining the overarching delivery strategy for site wide infrastructure and the need for diversity in tenure and product so multiple phases across the SUE can be delivered concurrently. Flexibility within/across phases should also be considered as mentioned earlier.

We have set out draft phasing and use types above, these are indicative only and the assumptions underpinning the phasing plan should be tested throughout the masterplanning process in collaboration with the wider consultant and client team. Please note that the planning strategy to be confirmed as part of the separate masterplanning appointment, with property consultant providing commercial view under this instruction.

\* Parcel Codes – There will be Strategic Site Wide Design Codes (focusing on Strategic Infrastructure and relationship to the built form, and key character areas) prepared alongside the Outline Planning Application by Savills, on behalf of the Consortium. At the individual Parcel level, Homes England will then prepare Parcel Codes to guide the detailed design of parcels by the Agency’s procured developer partners.

**Stage 1. Delivery Outputs:**

* Detailed market report
* Commercial input into marketability of the housing offer proposed by the masterplan options produced by masterplanner
* Input into the phasing plan for Homes England land holdings (to be prepared by the appointed masterplanner)

**Stage 2. Masterplan Testing and Refinement (including development viability)**

1. Review all technical documents to understand their impact on masterplan proposals and viability, to be discussed with client team and reflected in development appraisals.
2. Prepare development appraisals on a phase by phase and all phase basis to test assumptions in the draft masterplan and advise on key issues that impact viability and delivery. Importantly this should include a commentary on the impact of Homes England policy objectives on overall project viability. This will include, subject to confirmation, testing variables such as affordable housing provision, construction type (e.g. sustainability & design standards, form of construction (MMC, self-build), development type, phasing, etc.). This should tie in with work on Stage 1 above. Please note this excludes the District Centre (although we reserve the right to include this at a future point).
3. Engage with Homes England’s appointed masterplanning consultants, Multi-Disciplinary/ Technical consultant, wider partners and stakeholders to test the masterplan and phasing, informed by viability appraisals and the proposed infrastructure. This should help advise on a preferred option that will be promoted through the outline planning application process. This will include up to four updates to each development appraisal and appropriate sensitivity testing. The final masterplan option should aim to maximise:
4. The value and housing potential of the site in the context of the wider SUE.
5. Scheme viability.
6. Achievement of Homes England policy objectives set out in Homes England Strategic Plan around MMC, SMEs, self-build, etc.
7. Continue to engage with the masterplanning consultant to provide a commercial view as site-specific Parcel Codes are refined, and to advise on what impact this could have on scheme viability. Please assume commercial input into the development of Parcel Codes for each plot of land in the Phase 1 and Phase 2 land.
8. Based on the viability work above, develop a robust and deliverable phasing strategy for the development parcels within the area identified for this appointment (HE land).
9. Work with key partners including Consortium members, to enable a comprehensive approach to site wide development as planning applications come forward and to help to drive high quality development across Homes England landholdings that is deliverable both practically and viably and attracts a range of developers. This could include advice around s106 negotiations, equalisation, etc.
10. Review and provide commercial feedback into the emerging site-wide viability model that is being prepared by the consortium, to ensure that Homes England objectives are maximised. Please assume quarterly site-wide viability model updates that will require review and commercial feedback.
11. If required by the LPA, update the viability appraisals to support the OPA complying with RICS Guidance. For the avoidance of doubt, please assume this will be required and provide an estimate of costs as part of your submission. For the purpose of pricing, please assume this will be for Phase 1 and Phase 2 land only.
12. Preparation of a Stage 2 report identifying work undertaken to develop final development options, and summary of development appraisals and sensitivity testing with conclusions on final options and how this meets Homes England objectives.

**Stage 2 Delivery Outputs:**

* Detailed development appraisals on a phase by phase and all phase basis excluding District Centre, this will also be required in a format that will support the OPA.
* Detailed phasing and disposal programme for delivery of all phases of development excluding District Centre.
* Stage 2 summary report

**Stage 3. General Property Advice on Disposal Strategy for Homes England land**

In advance of preparing the site for marketing, Homes England requires further work to refine and confirm the disposal strategy. This includes but is not limited to the following key workstreams:

1. General advice on preparation of robust disposal strategy to include:
2. Market advice on values, phasing, tenure, development mix, market attractiveness, etc. Please note this will need to tie in with all workstreams above.
3. Updates to development appraisals prepared at Stage 2 and valuation advice in respect of Homes England ownership to inform disposal strategy. Please assume up to 2 updates to each development appraisal.
4. Potential acquisitions/ disposals – The opportunity may arise where Homes England needs to acquire or dispose of a parcel of land. This could lead to a requirement for the following additional services:
5. Draft valuation advice to support negotiations.
6. Lead role on negotiations with landowner and agreement of Heads of Terms for disposal.
7. Preparation of a Red Book valuation to support agreed transaction value to demonstrate best consideration.

For the purpose of evaluation, please assume 3 possible transactions with a market value of £3 million each.

1. Advice on the appropriate marketing and disposal strategy for the site (this could include a range of options), taking into account the current planning application, the proposed infrastructure delivery and the wider development proposals for the site. The aim is to achieve a range of Homes England objectives, to ensure that we are maximising market attractiveness, engagement with SMEs, delivery of new homes and achieving best consideration money, by clearly articulating how the strategy aligns with the Homes England Land Disposal Policy (to be provided to successful consultant).
2. Alongside preparation of the Disposal Strategy from Point 3 above, to review the Phase 1 land and advise on the site-specific disposal strategy for the early disposal of this land, including advice on site parcelling, development type, interested parties/ developers, etc. The consultant will review the DPS panel members and advise of any known contacts who should be approached with a view to joining DPS to maximise market exposure. This work will inform the early stages of Stage 4, Site Marketing Preparation via DPS.
3. To review the gap analysis of existing data & warrantable reports that will be prepared by the technical consultant, and to advise on any additional work required to support the marketing of the site, having regard to both proposed timescales and Homes England’s wish to minimise post tender price adjustments.
4. Review the identified site constraints and opportunities, and to provide commercial advice on gaps and mitigation strategies and solutions, (to be reflected in development appraisal work to inform disposal strategy).
5. On-going market advice on the emerging Framework Masterplan and detailed masterplans for Homes England’s landholding to inform outline planning applications for residential-led mixed use development once this work commences later in 2022.

**Stage 3 Delivery Outputs:**

* Disposal Strategy for all Homes England landholdings that aligns with Homes England Land Disposal Policy.
* Initial advice on disposal strategy for Phase 1 land.
* Input into gap analysis of existing data & warrantable reports and site constraints & opportunities.

**The following stages of work are for Phase 1 land only (HE1),** disposal of further phases will comprise a separate instruction subject to a new tender exercise at the appropriate time. Please note, for the purpose of pricing it should be assumed that the value of the Phase 1 land is £3 million, this will be subject to review prior to commencement of Stage 4.

**Stage 4. Site Marketing Preparation via DPS**

The purpose of this stage is to confirm the disposal strategy for the Phase 1 land, and to secure board approval to proceed to Stage 5, Site Marketing and Disposal.

We will be disposing of the site using the newly procured Homes England Dynamic Purchasing System via a ‘Call for Competition’. This comprises a Stage 1 ‘Expression of Interest’, followed by Stage 2 (a and b) ‘Tender Stage’. Please note that the Stage 1 Expression of Interest is to be completed prior to seeking board approval within this workstream, see point 6 below.

1. Initial advice on preparing the marketing strategy for the site via DPS including articulation of market testing strategy, approach to drafting marketing documents, Call for Competition, etc.
2. Soft Market Testing with DPS Members to get their views on the site to gain perspectives to inform the Call for Competition Tender Stage documentation including Pace, MMC, Design and deferred payment requirements. This will include a market testing questionnaire (based on a Homes England template) to test opinions around key issues including market interest, parcel size, sales revenues, sales rates, phasing, build costs, MMC, custom build, design aspirations, affordable housing mix and grant funding, etc. and the consultant will produce summary report highlighting key points that influence the disposal strategy.
3. In conjunction with the technical consultant, to advise on the extent and scope of the Tender Pack required to support marketing of the site to ensure as much information as possible is provided to enable developers to better understand the risks and opportunities, and to bid accordingly. This will include close liaison with the due diligence and technical consultants and lead project manager/s.
4. Based on work undertaken at Stage 3 (item 3), finalise the marketing and disposal strategy for the phases referred to above, taking into account both the planning status and the wider development proposals for the site.
5. Agree upfront a robust programme for the development partner selection process including the key stages and outputs.
6. Management of Call for Competition Stage 1 (Expression of Interest) via ProContract including preparation of documentation required for ProContract (site information, redline plan, illustrative masterplan and indicative disposal timeline) to enable developers to determine and confirm whether the opportunity is right for them. Please note Homes England will lead on managing ProContract including uploading documents, responding to clarifications, but the Supplier will support as required.
7. Contribute to a Gateway 3 (G3) report to secure formal Homes England approval to the marketing and disposal strategy for the above phases. The G3 paper will include a summary of market testing process and outcomes from Expression of Interest, as well as confirmation of disposals parameters (policy objectives around MMC, pace, design), evaluation criteria and weightings and deferred payment parameters.

**Stage 4 Delivery Outputs:**

* Market testing report
* Input into Tender Pack
* Marketing and disposal strategy for Phase 1 land
* Procurement programme for selection process
* Completion of Call for Competition Stage 1 Expression of Interest
* Input into G3 approval

**Stage 5. Site Marketing and Disposal via DPS**

Please note that, depending on the number of parties that express their interest at Stage 1 Expression of Interest, Stage 2 will comprise either a single stage process, or a 2-stage process with an upfront ‘Initial Questions’ stage to enable sifting of bidders to 5 or 6 parties. The appointed property consultant will be required to manage the site marketing process for Phase 1 land, including adherence to all requirements of the DPS process. This will include, but is not limited to, the following key responsibilities:

1. Preparation of the Tender Pack to include all marketing documents, technical information and Tender Forms required for DPS Call for Competition for issue to bidders via ProContract
2. Management of Call for Competition Stage 2a ‘Initial Questions’ and Stage 2b ‘Invitation to Tender’ via ProContract, supporting responses to queries and provision of any supplemental information as may be required. Please assume a 2-stage process will be required comprising Stage 2a ‘Initial Questions’ and Stage 2b ‘Invitation to Tender’. Please note Homes England will lead on managing ProContract including uploading documents, responding to clarifications, but the consultant will support as required.
3. Develop the scoring criteria in collaboration with Homes England and support/advise in the evaluation & assessment of ITT returns.
4. Ensure robust sign off processes for assessment, moderation and client approvals for audit purposes. Please note, the appointed agent is expected to support the preparation and take a joint lead at the Developer clarification sessions /interviews (There will be 2 of these sessions per developer at ITT stage) and moderation meetings.
5. Preparation of a “Marketing and Tender Evaluation Report” detailing the marketing and evaluation process, assessments of all developer appraisals leading to a clear recommendation t as to the preferred development partner and where appropriate, an under bidder.
6. Provide a “Franking Valuation Report” Please note, for the purpose of pricing, please assume three development plots with a value of £3 million each.
7. Input into the drafting for the Gateway 4 (G4) report to secure formal Homes England approval to the selection of the preferred development partners

**Stage 5 Delivery Outputs:**

* Final marketing documents including scoring criteria and evaluation documents
* Marketing and Tender Evaluation Report
* Franking Valuation Report
* Input into G4 report

**Stage 6. Legal negotiations to Contract Award**

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

**Stage 6 Delivery outputs**

* Support to legal advisor as required

# Indicative Programme

1. Suppliers should note the indicative programme dates when preparing their Programme information in the Response Form. Suppliers are asked to identify any key risks to delivery of this programme in their response.

|  |  |
| --- | --- |
| **Milestone** | **Anticipated to be completed by** |
| Due Diligence review of all information relating to consortium development of Masterplan | October 2021 |
| Pre-Collaboration Agreement completed | December 2021 |
| Outline Planning Submitted | December 2021 |
| Outline Planning Resolution to Approve\* | Summer/Autumn 2022 |
| Full planning application submitted for the Strategic Project Infrastructure Works | Summer/Autumn 2022 |
|  | To be determined once outline programme on the project has been worked up for both Homes England and the Consortium and as part of the Disposal Strategy to be developed by the Homes England Project team. |
| Outline Planning Decision Notice Issued |
| Approval to Dispose |
| Reserved Matters Submitted |
| Conditional Contract |
| Start on site |
| Reserved Matters Approved |
| Site Works Commence |
| Final Unconditional Disposal Date |

\*may be subject to change depending on OPA determination process

# Management



# Homes England Personnel

1. The Supplier will be managed on a day-to-day basis by a named Senior Development Manager who will be identified as the primary point of contact at Homes England. The wider project team includes (please note names will be confirmed after contract award):

* Project Director – project oversight.
* Head of Planning & Enabling – responsible for overall project delivery for this commission for Stage 1&2
* Head of Disposals – responsible for overall project delivery for this commission for Stage 3 onwards
* Senior Planning & Enabling Manager – Project Manager for Stage 1 & 2
* Senior Development Manager – Providing additional project resource, taking role as Project Manager from Stage 3 onwards

# Other personnel

1. The Supplier needs to work with the wider consultant team as set out in Section 1.4 above.
2. Other key Partners that the Supplier will need to work with include Birmingham City Council, and the Consortium Members.

# Meeting Requirements

1. Please note, attendance at the following meetings should be priced within your fee for each Stage of work of The Services as set out at Section 2 above.

**Start-up meeting**

1. We require two start up meetings, one to be held with Homes England only, and a second ‘consultant’ start up meeting to introduce the wider consultant team and agree project management / governance requirements. You are required to confirm attendance at these meetings as part of your response. Please assume each meeting will last for 2.5 hours and will require attendance from your project lead and project manager as a minimum.

**Project team meetings**

1. The requirement for these meetings will change throughout the course of the project and intensify at key milestones. You are required to confirm attendance at these meetings as part of your response. For the purpose of evaluation, please assume a fortnightly meeting is required for the duration of the 3-year contract. Please assume each meeting will last for 2.5 hours and will require attendance from your project lead and project manager as a minimum.

**Contract review meeting**

1. For the purpose of evaluation, please assume a requirement for quarterly contract review meetings. You are required to confirm attendance at these meetings as part of your response. Please assume each meeting will last for 2.5 hours and will require attendance from your project lead and project manager as a minimum.

**Poor Performance Meeting**

1. 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.

# Invoicing

1. This will be agreed at project inception and will include a mix of regular time-based invoicing and fixed fees for key delivery outputs. The successful consultant will keep Homes England informed of spend against budget using the submitted fee schedule format to maintain a clear audit trail. In the event of key changes in consultant personnel, the consultant will submit an up-to-date fee schedule and attend a meeting to discuss prior to departure of that individual.

# Other Requirements

# Termination

1. 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.
2. 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.

# Conflict of Interest

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. 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.

# Confidentiality

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.
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.

# Future changes to scope of works

1. Note that it is recognised that as the commission progresses and the disposal strategy evolves, the scope of works may change and as such Homes England retain the ability to discuss any amendments beyond what has been priced for in this tender with the appointed consultant at the appropriate time. Provision has therefore been made to amend / extend the scope of the commission either through supplementing existing or adding new work stages.
2. **Bidding consultants are NOT asked to price for any changes at this stage. If these services are required this will be discussed with the appointed consultant.**
3. Although any changes are anticipated to remain with this existing scope (i.e. one phase delayed), if any additional work is required, it will be subject to further agreement/approval by the Agency in writing and via TMS and will be based on value for money assessments. Additional work will be commissioned at hourly/daily rates directly related to the scope of works required and agreed.
4. Please note, additional scope of works will be up to a maximum of 50% of the original instruction, in order to remain compliant with Agency Procurement requirements.

# Part 2 - Instructions for Submitting a Response

# General

1. The Further Competition deadline is **12:00** on **30/06/2022** 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](mailto:ProContractSuppliers@proactis.com).
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.
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.
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.
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.
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.
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.
8. Tender responses must be written in English.
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.
10. Homes England reserves the right to cancel this Further Competition process at any time.

# Quality

1. A Response Form template has been provided in Part 2 to respond to the Quality questions detailed in Section 20 (Evaluation Criteria). The Response Form must be completed and returned as part of the tender response.
2. Suppliers must provide information on proposed staff in the Response Form and Resource and Pricing Schedule provided in Part 2. If the Supplier is a consortium or intends to sub-contract the Services, in whole or in part, then it should specify precisely in the Resource and Pricing Schedule which economic operator shall perform the Services (or parts thereof).
3. PLEASE NOTE: The Resource and Pricing Schedule will be scored qualitatively as part of the overall quality response. The schedule lists out the services that are required for the financial bid, the appropriateness of the quantum and seniority of resource will be scored as part of the quality bid. For example, if a particular workstream does not have an appropriate time resource or seniority allocated, it can be scored down.

# Pricing

1. A Resource and Pricing schedule has been provided as a separate excel spreadsheet with this Further Competition ITT which must be completed and returned as part of the tender response. Please note comments above that state that allocation of resource will be part of the quality evaluation.
2. The pricing approach for this Further Competition is a lump sum fixed fee for each stage of work, supported by a resourcing schedule to evidence time allocation for each proposed team member. An allowance should be included for expenses as part of the overall fee proposal, please note these will not be chargeable separately unless agreed in advance by Homes England and in exceptional circumstances where there is demonstrable need for the increased expense. It is anticipated that fees will be paid monthly in arrears, up to the satisfactory completion of specific milestones/ tasks/ packages of work.
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.
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 the services.

# Evaluation

1. Tender responses will be evaluated on the basis of the overall most economically advantageous Tender (MEAT) submitted to Homes England. The evaluation criteria (and relative weightings) that Homes England will use to determine the most economically advantageous Tender are set out in Section 7 (Evaluation Criteria) below and the scoring approach is detailed in Section 8 (Worked Example). Scores will be rounded to two decimal places.
2. Evaluators will initially work independently. Once they have completed their independent evaluation they will meet to discuss, understand and moderate any differences they have via a consensus meeting, where a single consensus score for each question will be agreed.
3. Award decisions will be subject to the standstill period if over the EU Services threshold. Unsuccessful Framework Suppliers will be provided with their scores and feedback to explain the award decision.

# Documents to be Returned

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

* Completed Response Form
* Completed Resource and Pricing Schedule

# Procurement Timetable

1. The procurement timetable that Homes England is working towards is set out below. Please note that this is indicative only, any changes will be communicated via ProContract.

|  |  |  |
| --- | --- | --- |
| **Stage** | **Milestone** | **Date** |
| Stage 3 - ITT | Issue Invitation to Tender | 19 May 2022 |
|  | Clarifications deadline for bidders | 23 June 2022 |
|  | Clarification response deadline | 28 June 2022 |
|  | **ITT Submission Deadline** | **30 June 2022 12PM** |
|  | Notification of successful bidder | 28 July 2022 |

1. **ProContract will provide the most up to date information regarding timescales.**

# Evaluation Criteria

|  |  |  |  |
| --- | --- | --- | --- |
| Quality will account for 70% of the Overall Score. The following scoring methodology will apply:  **5 – Excellent** Satisfies the requirement and demonstrates exceptional understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.  **4 – Good** Satisfies the requirement with minor additional benefits. Above average demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.  **3 – Acceptable** Satisfies the requirement. Demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services.  **2 - Minor Reservations** Some minor reservations of the Supplier’s understanding and proposed methodology, with limited evidence to support the response.  **1 – Major Reservations/Non-compliant** Major reservations of the Supplier’s understanding and proposed methodology, with little or no evidence to support the response.  **0 - Unacceptable/Non-compliant** Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Supplier has the understanding or suitable methodology, with little or no evidence to support the response.  **PLEASE NOTE:**  If your response scores 0 or 1 for any one question your overall submission will be deemed as a fail.  Any text beyond the specified page limits below will be ignored and will not be evaluated.  Homes England will not cross-reference to other answers when assessing quality responses, unless otherwise specified.  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. | | | |
| **No.** | **Criteria** | **Demonstrated by** | **Weighting** |
| 1 | **Technical Merit of Proposal**  **PAGE LIMIT:**Maximum *6* A4 pages, 11-point Corbel font | * A Methodology Statement that outlines the approach for each of the required services, outlining the key deliverables for each stage. Explain how the commission will be undertaken, and by who to link their experience that is relevant to the project. Outline where other supplier input may be required. * For each of the services required, provide a clear indication of the team’s capacity to undertake, innovate, add value and demonstrate value for money. * Explain how you will support the wider consultant team, and notably the masterplanning appointment, in ensuring that high-quality design, landscaping, stakeholder engagement and commercially aware placemaking will be aligned to infrastructure delivery requirements. * Describe how the team will approach the phasing and disposals strategy to maximise the site’s viability, attractiveness and deliverability to the market, setting it apart from its competitors nearby. * Explain how you will balance your advice to Homes England as master developer, with our role as landowner to ensure that we maximise best value in disposal of our own land interests, whilst maximising the wider SUE potential. * Please provide a summary of your relevant experience to demonstrate your track record in delivering advice in respect of similar services required under this brief for projects of a similar scale and complexity. In particular this should highlight your experience of maximising housing delivery with an emphasis on placemaking. Please evidence knowledge and experience of the local property market and experience in West Midlands. Please highlight key personnel and their role in the project to illustrate how this experience links with the resources identified in Q3. * Please highlight any other information that may be required to support delivery of your methodology, or to address any gaps in information, for instance additional surveys or appointments. | 30% |
| 2 | **Understanding of Project Requirements**  **PAGE LIMIT:**Maximum *4* A4 pages, 11-point Corbel font | * Please set out your understanding of the strategic context of the site, and how your methodology set out in Q1 above will support Homes England objectives both as master developer and as landowner. * Detail key risks and issues, and where appropriate identify the potential impact of external influences and stakeholders, and what actions you will take to ensure that these are mitigated and/or addressed, to support achievement of our strategic objectives. * Outline your approach to balancing the requirements of a significant infrastructure project across multiple stakeholders, with a key requirement to support project viability at the land parcel leve, with Homes England requirements around high quality design and placemaking. Please identify your understanding of value engineering and how this could be successfully applied to the scheme. | 10% |
| 3 | **Staff and other Resources**  **PAGE LIMIT:**Maximum *4* A4 pages, 11-point Corbel font (excluding CVs and structure chart) | * Describe who will undertake the commission and key accountabilities with a team structure chart. * Explain how work packages will be coordinated between the project team to ensure effective decision taking and information sharing with multiple project consultants. * Demonstrate the lead team members’ recent relevant experience from similar projects. * Give evidence of collaborative working with stakeholders and third-party delivery partners to add value, ensure quality, mitigate risk and respond to lessons learned. * Complete the excel document Resource and Pricing Schedule (not included in the 5-side limit). * Provide CVs for key members of staff (CV’s not included in the 5-side page limit). * State where any other supplier input will be required and how this would be managed. | 15% |
| 4 | **Management and Communication**  **PAGE LIMIT:**Maximum *4* A4 pages, 11-point Corbel font | * Summarise the approach you propose for project management to coordinate multiple workstreams, including identification of key personnel with responsibility for managing the overall quality of service, as well as managing the team and reporting to the client. * Explain how the team will meet the project objectives to deliver at pace, achieve high quality design, include the community and ensure value for money. * Outline the key project tools that you propose to use to effectively manage information, resources and actions within the project team and with external stakeholders. * Explain how the client relationship and decision-making will be managed, with reference to options analyses and change control processes. * Please clearly identify the number and regularity of client meetings / site visits, and who will attend, and what will be discussed at each meeting/ what the purpose of each meeting will be. Please note meeting assumptions set out in Part 1, Section 5.2, Meeting Requirements. * Support your answer with relevant examples where your team has added value to past projects that involved phased infrastructure delivery. Cross referencing with previous responses is permitted. * Please confirm that you do not have a conflict of interest associated with this commission. If there is a perceived conflict, please identify this so that this can be reviewed as part of tender clarification. | 10% |
| 5 | **Programme**  **PAGE LIMIT:**Maximum *3* A4 pages, 11-point Corbel font  (excluding programme/ chart) | * Provide a programme for appropriate work packages and deliverables that responds to the milestones and key trigger points in the project. Please confirm any viewpoints on whether the milestones provided are achievable. Please provide an indicative project programme in excel format that demonstrates these milestones. * Identify risks which may affect the programme or costs, what impact they may have, and any mitigation. * Describe how the team would coordinate different workstreams to track progress, mitigate the risks/ costs, inform the phased delivery and identify opportunities to add value.   To enable like for like comparison we have set out six workstreams in this ITT brief. Please comment on these. Identify any other information or items that you feel should fall within the scope to fulfil the brief. Make clear any additions, deletion, variations, exclusions or limitations. | 5% |

|  |  |  |
| --- | --- | --- |
| Price will account for 30% of the Overall Score. The lowest price will gain the maximum marks with other prices expressed as a proportion of the best score using the maths explained in the worked example below. | | |
| **Criteria** | **Demonstrated by** | **Weighting** |
| Price | Completed Resource and Pricing Schedule | 30% |

1. **Worked Example**

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

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Bidder | Question | Score out of 5 | Weighting | Weighting Multiplier | Weighted Score | Total Weighted Score |
| Supplier A | 1 | 2 | 30% | 6 | 12 | 33 |
| 2 | 3 | 10% | 2 | 6 |
| 3 | 3 | 15% | 3 | 9 |
| 4 | 2 | 10% | 2 | 4 |
| 5 | 2 | 5% | 1 | 2 |
| Supplier B | 1 | 5 | 30% | 6 | 30 | 59 |
| 2 | 4 | 10% | 2 | 8 |
| 3 | 4 | 15% | 3 | 12 |
| 4 | 3 | 10% | 2 | 6 |
| 5 | 3 | 5% | 1 | 3 |
| Supplier C | 1 | 2 | 30% | 6 | 12 | n/a (fail)\* |
| 2 | 1 | 10% | 2 | n/a |
| 3 | 2 | 15% | 3 | 6 |
| 4 | 2 | 10% | 2 | 4 |
| 5 | 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 30) |
| Supplier A | 350 | 350/350 = 100% | 100%\*30 = 30 |
| Supplier B | 700 | 350/700 = 50% | 50%\*30 = 15 |
| 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 | 33 | 30 | 63 | 2 |
| Supplier B | 59 | 15 | 74 | 1 |
| Supplier C | n/a | n/a | n/a | n/a |

# Part 3 Response Form

1. **Response Form**

|  |  |
| --- | --- |
| **Framework:** | 2018 – 2022 Property Professional Services Framework (2018/S 005-007230) |
| **Project Title:** | Langley SUE – Property Advisory and Agency Services |
| **ProContract Identification Number:** | DN596867 |
| **Supplier:** | [insert] |
| **Date:** | [insert] |

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

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

**1. Technical Merit of Proposal**

**2. Understanding of Project Requirements**

**3. Staff and other Resources**

**4. Management and Communication**

**5. Programme**

1. **Resource and pricing schedule**

Supplier to submit a completed Resource & Pricing Schedule in excel format to facilitate evaluation.

# Appendix A Draft Phasing Plan



# Appendix B DPS Technical Pack requirements

**Delivery Partner DPS Technical Pack Checklist**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ***Topic*** | ***Type*** | ***Commentary*** | | | ***Have?*** | ***Getting?*** | ***By Whom*** | ***When?*** |
| Reports | Ecology | * Birds, Bats, Badgers, Newts, Flora & Fauna * Biodiversity Agenda * Nutrient Neutrality [where applicable] | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Site Investigation | * Desktop, intrusive investigation and remediation strategy * Invasive weeds | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| FRA | * Storm & foul strategies   [see nutrient neutrality above] | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Archaeology | * Below ground and historic structures | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Noise | * Could be combined, could be one or the other * Site emitting or external sources | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Vibration |
| Air Quality | * Contaminants * Malodourous | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Arboriculture | * Survey, tree protection and TPO’s | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Asbestos Register or Pre-demo Survey | * Occupied buildings should have a Register * Disused to be surveyed | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Rights of Light | * Check title for positive covenants and neighbouring titles for restrictive covenants | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Wind Microclimate | * If applicable for high-rise development only | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| UXO | * MOD sites * City centres | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Landscape Strategy | * Biodiversity Net Gain | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Party Wall Matters | * Buildings on boundary * Walls | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| TIA | * Existing traffic generation, permitted uses * Predicted generation | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Energy Strategy | Renewables | * PV * Solar | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Heating | * No gas from 2025 * Heat Pumps | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Electric Vehicles | * Charging provision | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Sustainability Strategy | * Carbon reduction | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
|  | | | | | | | | |
| Surveys | Topographic | * Full survey including, drainage, building floor levels, boundaries, surrounding roads and neighbouring detail * Elevations of surrounding structures | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Measured Building Survey | * Listed / retained buildings | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Building Structural Condition Survey | * Retained / refurbished buildings | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| River wall condition Survey | * To show type of structure and condition - if possible with schedule of remediation works. | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Drainage Survey [CCTV] | * Minimum requirement is for outfall pipe | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Below Ground Services | * Electronic trace for all cables, conduits, pipelines and/or Slit trenching | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Below Ground Structures | * Radar, geomagnetic and other non-intrusive techniques and/or Slit trenching/ trial pitting | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Historic Maps | * Should be part of SI | | | [**P**/X] | [**P**/X] |  | *[Insert date]* |
|  | | | | | | | | |
| Records | Public sewers | * Water Authority records | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Highways | * Local authority adoption plan | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Environment Agency | * Flood plain * Landfill Sites * Groundwater Protection Zones | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Statutory Undertakers | Gas | * National Grid | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Water | * Local Water Company | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Electric | * Local Electric Company | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| BT | * Openreach | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| CATV | * Various | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Mobile Telecoms | * Various | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Fibre Networks | * Various | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[insert date]* |
| Mining Records | * Go to <http://mapapps2.bgs.ac.uk/coalauthority/home.html> | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Rail/Tram Lines | * Network Rail * London Tube/Regional Metro lines | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Existing building Services | * Utility providers info to facilitate demo | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
|  | | | | | | | | |
| General Data | Title Plan | * inc. report & charges register | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Contract Plan | * Defining site under consideration | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Planning Notices | * Decision notices | | * Outline/RM/Appeal consents | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| * Conservation Area * Listings | | * Structures/AONB/ SSS | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |
| Existing Building Floor Plans | * inc. ft2 for CIL calculation | | | [**P**/X] | [**P**/X] | *[Insert tbc/name/title/refs]* | *[Insert date]* |

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