

Appendix 1

Specification

For the appointment of Managing Agent and Associated Services Specialist

# **Profile of Bridge Homes**

Bridge Homes is jointly owned by Wakefield Council and Wakefield and District Housing Limited (WDH), the business was established in 2014 to develop new build housing for private residential sale. The Partnership was established to operate commercially to generate profits which can be reinvested within the District. Both the Council and WDH are invisible to the Bridge Homes brand, and the company has been marketed in its own right and with its own persona and team. Bridge Homes has an established website showcasing its homes for sale which can be accessed at [www.bridgehomesyorkshire.co.uk](http://www.bridgehomesyorkshire.co.uk)

Sites which have been identified are in attractive locations where property values are good. In keeping with establishing a clear identity which is not ‘council’ or ‘social’ focussed the company are building and selling homes aimed at the middle-market of private housing sector.

Bridge Homes has successfully delivered its inaugural site of 30 new homes, along with a further site of 43 units. The third site of 96 units will be complete later this year. The fourth site of 55 units is now on site with completion expected by April 2021.

Further developments are currently being scoped out as part of developing a 10 year programme. Extensive work has been undertaken to define and establish a consistent tone of voice for the company, which supports our brand, values and aspirations, and runs through all our marketing activities.

**Our values**

* High quality of service;
* Excellence in design and innovation;
* Trustworthy to deal with; and
* Proud to be a Wakefield company.

**What kind of homes do we build?**

Each Bridge Homes development has architecturally designed properties and are developed using the 10 characteristics which we think sets Bridge Homes apart from our competitors and what our market research tells us our customers are looking for from a new housing development. The characteristics are:

* Strong sense of place.
* Green streets.
* Clutter and car free environment.
* Developments that put people first.
* Simple and elegant architecture.
* A toolkit of quality house types and components.
* Ongoing consumer feedback and product refinement.
* Facilities for 21st century living.
* Places to meet.
* Sense of community.

**The Bridge Homes USP**

* We are a Wakefield based company.
* Our local connections give us stronger links to local communities.
* We will re-invest the profits from the joint venture into building new homes in the Wakefield district and surrounding areas.

# **Specification Information**

In pursuance of the company’s business objectives, Bridge Homes are seeking to procure managing agent services and have an agreement for a duration of up to two years.

**Appendix 9 includes individual plans of each site (listed in Appendix 3 Pricing Schedule). Each drawing will highlight the types of management required as set out in the specification below. The drawing will also contain the approximate square meterage of specific areas of differing grounds maintenance practices. The plans will also show the total number of units contained on each site.**

Those wishing to be considered will need to evidence that they have the robust ability and experience in the managing agent services sector.

**Scope of the work**

**1 Understanding our Requirements**

Tenderers are required to demonstrate that they understand what Bridge Homes wants to achieve and to provide the following services:

* General Grounds Maintenance works
* Repairs and Maintenance of infrastructure i.e. attenuation tanks
* Managing Agent Fees (collection of service charges and associated administration)
* Insurances (Public Indemnity and Common Part Insurance)
* Accountancy and Audit
* Health and Safety Inspection (Where require Fire Risk Assessments)
* Reserve / Sinking Fund
* Customer service including effective management of complaints.
* All servicing, works and testing, etc. undertaken will be required to have a proof of completion to be emailed to customercare@bridgehomesyorkshire.co.uk within 5 working days of completion
* An implementation meeting will be held at commencement of the contract with the Bridge Homes Joint Venture Manager and Project Manager and the appointed supplier to finalise the on-going operational aspects of the contract.

In order to provide the detail, we require in your tender, we believe it is essential that you have visited the sites in question. Therefore, you need to have visited the following sites and undertaken an appropriate assessment, ahead of bidding, in order to provide an accurate bid:

* Calder Gate (St Swithens Drive, Wakefield);
* Calder Fields (Standbridge Lane, Wakefield);
* Thornesgate (Horbury Road, Wakefield);
* Spring Fields (Springfield Grange, Flanshaw, Wakefield);

There is no need to contact us before you visit, but **it is essential that you confirm within your tender that you have visited all the sites above and you do not have any outstanding queries (as you will see in the evaluation criteria, there is a pass/fail criterion against this requirement, where failure to comply will mean you are eliminated from the tender process).** Should you have any queries, these should go via the ProContract portal messaging system.

As part of the appendix 9 attachments are numerous plans and documents relating to the sites and elements of the sites, for example, plans and attenuation tank details. Furthermore, in order to assist with your site visits, please note the following features / site specific elements (amongst other factors you should review) when considering your assessment of the sites and ultimately the pricing and tender submissions:

* Calder Fields, Standbridge Lane – the attenuation tanks (identified on the plans)
* Thornesgate, Horbury road - the ‘scrub land’ adjacent to the main road boundary
* Spring Fields, Flanshaw- the ‘scrub land’ behind plots 43 and 44

Key tasks under each service are as follows:

* 1. **General Grounds Maintenance Works**

When submitting a tender cost for annual landscaping the tenderer will be expected to include the following specification requirements for each site:

* Grass cutting- amenity – Cut and collect grass every two weeks in growing season from March until October.
* Grass cutting – Rough/meadow areas – cut and collect three times annually
* Shrub maintenance – biannual cut and tidy (all waste to be removed from site)
* Hedge Maintenance – annual cut (all waste to be removed from site)
* Litter Picking – every site visit (all waste to be removed from site)
* Tree maintenance – visual inspection and works if required
* Boundary maintenance – including metal and timber fences - visual inspection and works if required
* Weeding – hard standing spray every site visit (all waste to be removed from site)
* Mulch strips – to be replenished annually
* It is the successful tenderers responsibility to ensure that they and / or any sub-contractors used in relation to the removal and transfer of waste comply with appropriate legislation. They must provide all the required documentation / electronic (digital) records to Bridge Homes, for example, waste transfer notes, as well as ensuring they have full and complete records themselves, to comply with the legislative requirements and/or guidance issued by the Environment Agency and provide management information relating to each individual transfer in-line with the requirements of the Environment Agency / legislation.
  1. **Repairs and Maintenance of Infrastructure**
* Attenuation tanks – inspect and clean as necessary in line with manufacturers guidance – highlighted on plans. Specification of the tanks are included within the Appendix 9 attachments.
  1. **Managing Agent**
* Invoices to be generated and sent to all freeholders on each estate in a timely manner (In line with ARMA Guidelines)
* Service charges to be collected in relation to all associated managing agent costs
* Individual trustee status client account for each development
* Compliance with S42 of the Landlord & Tenant Act 1987, ARMA and RICS guidelines and all interest is credited to the Client account.
* Year-end accounts to be supplied within three months
  1. **Insurances**
* Public liability insurance to £5,000,000
* Employers liability insurance to £5,000,000
* Directors and Officers insurance
* Building insurance (Thornesgate Apartments)
* Engineering Insurance (for lift at Thornesgate)
  1. **Accountancy & Audit**
* Managing Agent to provide both a set of Company and Service Charge Accounts on request.
* Company secretary provision for all filings
  1. **Health & Safety Inspection**
* Annual H&S and FRA (Where required) inspections/audits of each site to be carried out and the update certificate and proof of works to be emailed to [customercare@bridgehomesyorkshire.co.uk](mailto:customercare@bridgehomesyorkshire.co.uk) within 5 working days of completion.
* Compliance to ensure maintenance of Fire Detection, Prevention, Fire Fighting & Escape Equipment, Electrical Safety Inspections / Maintenance, Fire Risk Assessments, General Health and Safety Risk Assessments, Lifting Equipment Statutory Engineering Insurance / Inspections
  1. **Reserve/Sinking Fund**
* Reserve/Sinking Fund to be provided to cover future works.
* To be held in an individual client account.
* On termination of contract, fund balance to be transferred to new provider
* Independently audited annual information should be provided to Bridge Homes, as requested by Bridge Homes regarding verification of the fund.
  1. **Future Contractual Additions**
     1. **Thornesgate Apartments:**

To be added to contract in July 2020. An exclusive private apartment block including 12 individual apartments and communal areas (internal & external).

These properties will require an additional service charge over and above the estate charge. Items to be included cleaning, maintaining, decorating, repairing and replacing the retained parts:

* Cleaning internal and external communal areas weekly (including external bin store) to include:
  + Weekly hoovering of all internal communal areas
  + Weekly mop of all internal communal hard floor surfaces
  + Weekly dusting of all surfaces within communal areas
  + Bi annual carpet clean
  + Provision for replacement of communal flooring if necessary
* All external windows to be cleaned on a monthly basis
* Decoration – provision for a decoration allowance to include annual touch up of any marks
* Monthly inspection, maintenance and emergency response where required of (all specifications included):
  + Door entry systems
  + Lift (45 minute ‘trap in’ response and two hour ‘non trap in’ response
  + Electric vehicle charging points,
  + Electronic entry gates (vehicular and pedestrian)

To make safe all accidental and malicious damage to all of the above within four hours.

* 5 Year Fixed Wire Test of communal areas
* To cover the costs of all communal heating and lighting bills
* Replacement where necessary of light bulbs and other fixed items
* Grounds maintenance of private apartment areas (plan to be attached to tender)
* Provision for re supply of access fobs, if lost, or damaged by occupiers or contractors.
* Carry out all required common part repairs as and when required.
* Ensure annual roof inspections are carried out.
  + 1. **Springfield Grange, Flanshaw, Wakefield**

This development of 55 properties is expected to complete in April 2021. It is expected that this tender will cover the Managing Agent function for this site. Details of the scheme are attached in separate documents as part of Appendix 9. Please provide a price for the managing agent function with the assumption that this site will be included in the tender with an anticipated start date of May 2021.

**2 Contract Management**

Contract review meetings will be held at least on a quarterly basis for the first year of the contract, and periodically after that (at least every six months) unless otherwise agreed, to review and discuss any issues relating to the performance of the contract. Attendance at any contract management meetings (and related activities), along with the provision of any on-going management information (MI) requirements of Bridge Homes should be supplied free of charge (FOC) and in the format and time intervals required by Bridge Homes.

The meetings will be held between the appropriate personnel from the supplier, for example, the Account Manager and a senior organisation member when requested by Bridge Homes, and the Bridge Homes Joint Venture Manager and Project Manager, as well as a Corporate Procurement team representative. Throughout the duration of the contract, the meetings will formally review the supplier’s performance and hence the effectiveness of the contract based upon the KPIs i.e. Key Performance Indicators required by Bridge Homes (and MI (management information) provided by the supplier on an on-going basis against these, free of charge), and the continuous improvement principle

Critical KPI’s and minimum service levels, will include (but not limited to) the following detailed in the table below.

Please note that instructions will be provided by the Bridge Homes Joint Venture Manager and Project Manager and communication must be maintained on a regular basis with the project lead to ensure that Bridge Homes is fully informed on progress in relation to all contract management related issues. The Joint Venture Manager and Project Manager will work alongside the Supplier, providing support to signpost the supplier to relevant requested information.

**Key Performance Indicators (KPIs)**

| **Activity** | **Performance** | **Responsibility, Target and Measurement** |
| --- | --- | --- |
| Grounds maintenance works (including compliant waste removal) | Completion of the specified works for all sites within the timescales / frequencies specified. | Supplier. Target 98% measured by work undertaken and documentation / evidence that work undertaken, and inspections made. |
| Repairs and maintenance of infrastructure | Completion of the specified works for all sites within the timescales / frequencies specified. | Supplier. Target 98% measured by work undertaken and documentation / evidence that work undertaken, and inspections made. |
| Collection of charges and associated activities | Completion of the collection of charges duties and associated activities in accordance with the specification requirements and timescales. | Supplier. Target 98% measured by work undertaken and documentation / evidence that work undertaken, and audits made |
| Health and Safety inspections | Completion of the specified inspections / works for all requirements / sites within the timescales / frequencies specified. | Supplier. Target 100%, measured by work undertaken and attendance on site or location as confirmed by the JV Manager or other Bridge Homes representative and /or documentation / evidence of work undertaken. |
| Reserve / Sinking fund provision. | Provision of the fund in an appropriate account with legal commitment made to transfer at end of contract to new provider along with independently audited and verified information. | Supplier. Target 100% measured by documentation provided and independently audited verification undertaken, and commitment made re end of contract transfer. |
| Cleaning, internal external and windows. | Specification requirements are completed as detailed. | Supplier. Target 95%, measured by completion documentation / evidence from supplier that all work completed. |
| Inspection and maintenance undertaken | Inspection and maintenance of the various items outlined in the specification, for example, door entry systems, lifts, electric charging points and electronic entry gates (vehicular and pedestrian) undertaken in accordance with specification | Supplier. Target 98%, measured by work undertaken and attendance on site or location as confirmed by the JV Manager or other Bridge Homes representative and /or documentation / evidence of work undertaken. |
| Call-outs, i.e. emergency response call-outs (for example, lifts for ‘trap-ins’). ‘Trap ins’ 45 minutes, non ‘trap ins’ 2 hours. | Response to call that there is a ‘trap in’, 45 minutes; non ‘trap in’ 2 hours to be on site and making repair. | Supplier. Target 100%, measured by time from notification to the supplier until attendance on site or location to make repair as confirmed by the JV Manager or other Bridge Homes representative |
| Make safe of accidental and malicious damage. | All accidental and malicious damage detailed in the specification is made safe within four hours of notification to the supplier. | Supplier. Target 100% measured by the time from notification to the supplier until ‘make safe’ work notified to the JV Manager or other Bridge Homes representative and /or documentation / evidence of work undertaken |
| Customer relationships | Customer relations and satisfaction (tenants / freeholders) is maintained whilst delivering the services. | Supplier. Target 95% measured by customer feedback received by the supplier through an appropriate means / process and reported to Bridge Homes. |
| Complaints handling | Complaints are handled via a prescribed and recorded process concluding with a managed and satisfactory outcome with appropriate communication made with the tenants / freeholders and Bridge Homes | Supplier. Target 95% measured by reports produced and provided to Bridge Homes on complaints, the process and satisfactory outcomes. |
| Continuous Improvement Plan | Continuous Improvement Plan presented with appropriate continuous improvement SMART actions (with appropriate progress updates) every 6 months of the contract term. | Supplier. Target 100%, measured via receipt of plans / updates. |
| Contract Management Meeting Attendance | The supplier account manager (and other supplier representatives required by Bridge Homes) will attend every Contract Management Meeting. Initially meetings to be held every 3 months from the contract start until otherwise advised by Bridge Homes. | Supplier / Bridge Homes. Target: 100%, measured via Contract Management Meeting minutes / notes. |

**3 Continuous Improvement**

Continuous improvement is important to Bridge Homes. To ensure that services remain current and continue to meet the needs of the overarching project, a continuous improvement program will be put in place and be an on-going aspect of the contract with the supplier. The supplier is required to formulate ideas on continuous improvement and those continuous improvement concepts deemed by Bridge Homes to be appropriate may be adopted at no expense to Bridge Homes.

The continuous improvement program will include a quarterly review over the effectiveness of the services provided, including any issues relating to the service, along with discussion of changes to the service as deemed necessary. The supplier shall provide any further information free of charge that Bridge Homes requests in connection with any improvements to the services.

**4 Other Considerations**

The initial contract is envisaged to start on the 1st August 2020, although tenderers should note that Bridge Homes reserves the right to commence the agreement sooner should they believe it appropriate to their requirements to do so and will run until 31 July 2021, with the option to extend, at Bridge Homes’ sole discretion for one further period of one year until 31 July 2022.

Affordability is a key consideration and Bridge Homes reserve the right not to award a contract if it is deemed (by Bridge Homes) that Tenders received are not affordable.

As detailed within Appendix 6 in relation to IPR (Intellectual Property Rights); all patents, copyright and other IPR in relation to all raw data and documents shall remain the property of Bridge Homes. All originals and copies thereof shall be delivered to Bridge Homes at the end of the commission. The Supplier will be required to certify that no documents or data are retained in its possession.

**5 Evaluation Requirements**

|  |  |
| --- | --- |
| **Price (60)** |  |
| **Overall Cost / Rates** |  |
| **The score will be based on the information provided in Appendix 3 (Schedule of Tendered Prices) for the provision of services outlined in the Specification in Appendix 1.** |  |
| NB: The lowest priced bid will attract full marks. All other bids will be awarded marks in proportion to the price differential when compared to the lowest priced bid. |  |
| Lowest bid price / individual bid price x 60.  For example, if the lowest fee was £25,000 then this would score 60 points.  If the next bid was £30,000 then this would score 50 points. |  |
| Overall cost for the Services (excluding VAT) based on the costs detailed by tenderers in their responses in Appendix 3. Tenderers are asked to complete all tabs in Appendix 3 for each of the sites. | 60 |
| **Sub Total** | **60.00** |
| **Quality: Response To Specification (40)** |  |
| **NB. The Specification is outlined in Appendix 1.** |  |
| Confirmation of site visits undertaken and you do not have any outstanding queries. | Pass/Fail |
| 1. **Relevant contract experience and competence**   Please provide details of your organisation’s relevant experience in  providing, managing agent services for similar organisations to Bridge Homes and the sector and markets they operate in. Please detail what your  role was and the services provided.  Details should include up to 3 contracts that are relevant to the Bridge Homes contract. Furthermore, for verification please provide a named contact  for each contract who should be able to provide written evidence to  confirm the accuracy of the information provided.  Where you intend to sub-contract a proportion of the contract please demonstrate how you have previously maintained healthy supply chains with your sub-contractors.  **1.1** If you are unable to provide at least one example of contracts, as required under section 1.0, in no more than 500 words, please provide an explanation for this e.g. your organisation is a new start up or you have provided services in the past but not in a contract. | **15** |
| 1. **Methodology, Resources, Skills and Timescales**   Please provide a strategy and delivery plan for each of the services required covering the methodology, resources, skills and timescales. | **10** |
| **3.0 Methodology and Contract Management for Public and Operative Safety**  Please outline how you will ensure that the contract is run appropriately and how you will ensure both operative and public safety whilst delivering the contract targets. | **10** |
| **4.0** **Customer Relationships**  4.1 Please outline how you will deliver and maintain the customer relationship with the tenants/ freeholders when delivering the services. | **5** |
|  |  |
| **Sub Total** | **40.00** |
| **Grand Total** | **100.00** |