

WHOLE HOUSE REFURBISHMENT AND ASSOCIATED WORKS

2ND MARCH 2020 - 1ST MARCH 2024



WH2 FRAMEWORK GUIDE

ABOUT THIS FRAMEWORK

This SWPA framework was developed to provide an efficient, value for money procurement route for the delivery of public sector housing refurbishment works.

The tender was carried out in strict accordance with the EU Procurement Directive and UK public sector procurement rules.

Places on the framework were awarded to 16 different suppliers in various workstreams with two value bands and across four regional Lots.

The framework will run for a maximum of four years. However, individual call-off projects can be completed beyond the four-year duration of the framework as long as a contract is in place prior to the framework expiry date. The term of the framework is from **2 March 2020 to 1 March 2024**.



SWPA provides OJEU compliant frameworks, which can be used by local authorities, social landlords and other public sector organisations to procure works, products and services for the construction, refurbishment and maintenance of social housing, schools and public buildings.

The South West Procurement Alliance brand, which is part of the LHC Group, was launched in October 2019.

Our aims are to work closely with South West clients and appointed companies and to focus on regional priorities. We are a locally based, growing team with offices in Exeter.

LHC was established in 1966 and is acknowledged as one of the most experienced and respected providers of procurement frameworks in the construction sector.

The relationship between the LHC Group and the local SWPA team gives SWPA the unique position of having local knowledge and relationships, while also benefiting from additional resources and expertise from a national framework provider.

South West Procurement Alliance (SWPA)

The Generator Hub | The Gallery | Kings Wharf | The Quay | Exeter | EX2 4AN

01392 574 100
info@swpa.org.uk

@SWPAProcure
South West Procurement Alliance (SWPA)



FRAMEWORK SCOPE

In order to ensure that companies invited to submit subsequent Invitations to tender were capable, candidates were asked to submit responses to a number of quality questions for each Lot that they applied for.

Workstream 1 - Individual Specialisms

Kitchens and Bathrooms	Electrical Works
Landscaping	Painting & Decorating

Workstream 2 - Multi-Disciplinary Services

As well as the specialist works listed in Workstream 1 this workstream is for the delivery of a wide range of whole house refurbishment works including any of the following additional works:

- | | |
|---|--|
| <ul style="list-style-type: none"> > Heating and electrical > Disabled adaptations > Supply, renewal of gas fired central heating and upgrading of boilers > Electric heating installations > Roofing | <ul style="list-style-type: none"> > Electrical wiring > Cladding > Renewal of windows and doors, including fire doors > Fire detection, suppression systems, and sprinklers |
|---|--|

Please read the ITT service specifications (Section C) for more details on the works provided as part of this framework. These specifications are available on request.



APPOINTED COMPANIES



WORKSTREAM 1: INDIVIDUAL SPECIALISMS

INDIVIDUAL WORKS

£250,000 to £2million

GLOUCESTERSHIRE,
WILTSHIRE AND
BRISTOL/BATH AREA

Kitchens & Bathrooms	Landscaping	Electrical Works	Painting & Decorating
CLC Contractors Ian Williams Mears NKS Contracts (Central) Novus Property Solutions	Novus Property Solutions	CLC Contractors MD Building Services NKS Contracts (Central) Novus Property Solutions OpenView Security Solutions	CLC Contractors D R Jones Yeovil Ian Williams Novus Property Solutions

DORSET AND SOMERSET

Kitchens & Bathrooms	Landscaping	Electrical Works	Painting & Decorating
CLC Contractors Ian Williams Mears NKS Contracts (Central) Novus Property Solutions	Novus Property Solutions	CLC Contractors MD Building Services NKS Contracts (Central) Novus Property Solutions OpenView Security Solutions Westcountry Maintenance Services	CLC Contractors D R Jones Yeovil Ian Williams Novus Property Solutions Trident Maintenance Services

DEVON

Kitchens & Bathrooms	Landscaping	Electrical Works	Painting & Decorating
CLC Contractors Ian Williams MD Building Services Mears Novus Property Solutions	Novus Property Solutions	CLC Contractors MD Building Services Novus Property Solutions OpenView Security Solutions Westcountry Maintenance Services	CLC Contractors D R Jones Yeovil Ian Williams Novus Property Solutions

CORNWALL

Kitchens & Bathrooms	Landscaping	Electrical Works	Painting & Decorating
CLC Contractors Ian Williams MD Building Services Mears Novus Property Solutions	Novus Property Solutions	CLC Contractors MD Building Services Novus Property Solutions Westcountry Maintenance Services	CLC Contractors D R Jones Yeovil Ian Williams Novus Property Solutions

WORKSTREAM 2: MULTI-DISCIPLINARY SERVICES

MULTI-DISCIPLINARY WORKS

£250,000 to £2million

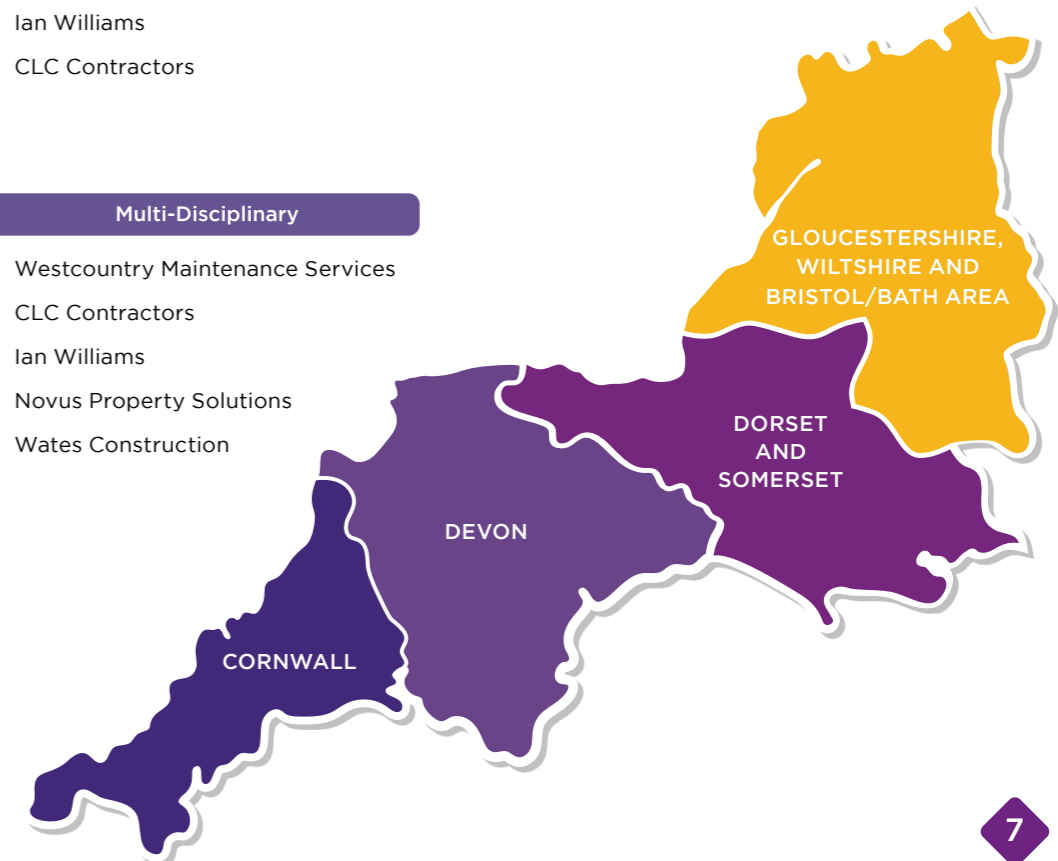
£1.5million to £5million

Multi-Disciplinary	Multi-Disciplinary
AYM Services CLC Contractors Ian Williams Novus Property Solutions OpenView Security Solutions	EQUANS OpenView Security Solutions Wates Construction Sustainable Building Services (UK) Ian Williams CLC Contractors

Multi-Disciplinary	Multi-Disciplinary
AYM Services CLC Contractors Ian Williams Novus Property Solutions OpenView Security Solutions Westcountry Maintenance Services	CLC Contractors EQUANS Ian Williams OpenView Security Solutions United Living (South) Wates Construction

Multi-Disciplinary	Multi-Disciplinary
AYM Services CLC Contractors Ian Williams Novus Property Solutions Westcountry Maintenance Services OpenView Security Solutions	EQUANS OpenView Security Solutions Wates Construction Ian Williams CLC Contractors

Multi-Disciplinary	Multi-Disciplinary
CLC Contractors Ian Williams Novus Property Solutions Westcountry Maintenance Services	Westcountry Maintenance Services CLC Contractors Ian Williams Novus Property Solutions Wates Construction



TENDER AND EVALUATION PROCESS

This was a two stage Restricted Tender, with an initial Selection Questionnaire stage, followed by shortlisted tenderers being invited to submit an Invitation to Tender (ITT) response.

Selection Questionnaire Documents & Evaluation

Applicants were required to complete the PAS 91 Selection Questionnaire which included:

- > **Mandatory questions** - Including grounds for exclusion of applicants based on criminal convictions and the non-payment of taxes, insolvency, professional misconduct and non-payment of social security contributions.
- > **Minimum Insurance Cover** - Minimum of £5 million insurance cover for Public Liability, Employees Liability and Professional Indemnity.
- > **Financial Due Diligence** - Applicants were assessed on their turnover and Credit Safe financial assessment score. The results of this check were assessed on a pass/fail basis.

Selection Questionnaire Documents & Evaluation

Applicants were required to obtain a quality score of over 60% to progress to the ITT stage.

- > three relevant case studies 30%
- > technical capability 30%
- > social value 20%
- > project resourcing 20%

ITT Documentation

The ITT evaluation process comprised two main elements, requiring tenderers to respond to technical and quality questions, and to complete a pricing schedule.

The ITT assessment weighting is **60/40** Quality/Price criteria with the sum of both scores establishing the Most Economically Advantageous Tenders (**MEAT**).



Technical and Quality Questions

Tenderers provided written statements and evidence of their technical ability to provide the works as outlined in the service specifications for Workstream 1 (Specialist Services) and Workstream 2 (Multi-disciplinary). The Specification document (Section C) details the works and services to be delivered through the Framework Agreement. The service specifications and pricing schedules are based on the M3NHF specifications for Planned Maintenance & Property Reinvestment Works version 7. A pdf copy of the NHF service specifications and pricing schedules were provided as part of the tender documents.

The Technical/Quality questions in the ITT are as follows and comprise a total weighting of **60%**:

- | | | | |
|---------------------|-----|-----------------------|----|
| > Project Resources | 10% | > Defects Resolution | 7% |
| > Safe Working | 10% | > Contract Management | 7% |
| > Customer Care | 10% | > Social Value | 6% |
| > CDM Compliance | 10% | | |

Pricing Schedule

M3NHF schedule of rates version 7 has been used as the baseline for pricing this framework agreement. However other elements of pricing have been weighted and scored to comprise the total pricing weighting of **40%**, these are:

- | | |
|--|-----|
| > Profits, overheads and preliminary costs | 20% |
| > NHF rates and regional uplift | 10% |
| > Scenario price | 10% |

All prices offered for all items are the companies' maximum rates they can charge under this framework agreement. All prices on the framework are subject to an annual uplift to allowable fluctuation adjustments taken from the construction output Price Index (OPI 2015=100 series) Housing Repairs and Maintenance as published by the Office of National Statistics.

A copy of the full evaluation report is available on request.

Community Benefits

The appointed suppliers' commitment to social value was evaluated during the tender process but SWPA encourage clients to include requirements for community benefits projects and social value initiatives in their call-off contracts.

Procurement and Project Support

SWPA are able to provide procurement advice and technical support relating to your project requirements. We can assist you at various stages from inception to completion.

Talk to our team if you would like help with any of the following :

- > Project specifications, adhering to regulations and standards
- > Assisting with pre-contract surveying duties, visiting site, taking measures etc.
- > Creating schedules of work for projects
- > CDM advice. e.g. risk register, notifiable projects (F10), appointment of Principal Designer
- > Planning and Building Regulations advice including self-certification schemes
- > Contractual advice, e.g. measured term v lump sum
- > Independent evaluation of tenders as part of your client team
- > Post-tender mathematical checks to ensure price validity
- > Price validations, verifying prices against framework rates
- > Attendance at prestart meetings and subsequent project monitoring
- > Interventions should contractors not perform

For lower value works refer to our Whole House Refurbishment Dynamic Purchasing System (DPS)

The DPS will generally apply to minor building works projects valued up to £500k per project.

For details of the DPS and all of our other frameworks see our website: www.swpa.org.uk/dps/

CALL-OFF AWARD OPTIONS

The Framework allows clients the option of:

Direct award without further competition, where all terms and conditions of the call-off project are within the terms and conditions of the framework

OR

Mini-competition, where terms and conditions of the call-off may vary or be modified from the framework or at the choice of the Client.

When calling off projects, clients can use any one of a range of standard forms of building contract including JCT/SBCC, NEC/NEC4, ACE, PPC, TPC, FAC1, or their own in-house agreement.

Eligibility

SWPA is a not-for-profit organisation, governed by public law and a central purchasing body providing procurement services. Publicly funded organisations throughout the South West use SWPA frameworks to procure works, goods and services to construct, refurbish and maintain social housing, schools and public buildings:

- > Local Authorities and any subsidiaries and joint-venture vehicles of those Local Authorities.
- > Registered Social Landlords (RSL), Tenant Management Organisations (TMOs) & Arm's Length Management Organisations (ALMOs)
- > Health Authorities, Councils, Boards and Trusts
- > Publicly Funded Schools
- > Universities and Further Education Establishments
- > Colleges
- > Police Forces
- > Fire and Rescue services
- > Registered Charities

Details of those contracting authorities identified are listed at www.lhc.gov.uk/24

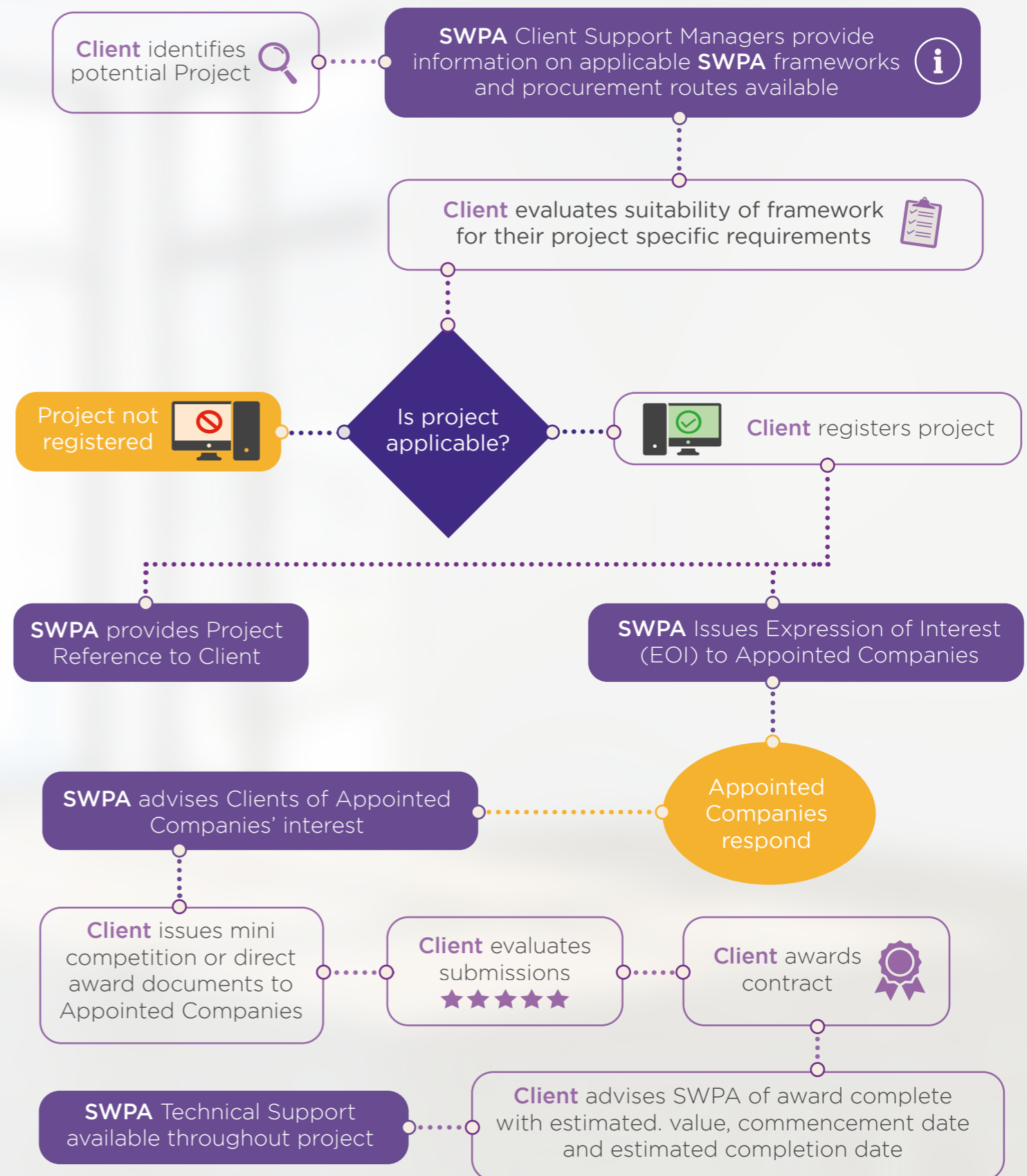
Accessing the Framework

Companies appointed to SWPA frameworks are required to pay a small percentage ('the levy') of the total value of every invoice submitted to clients and to submit quotations to clients that are inclusive of the levy. As a not-for-profit organisation, SWPA returns surplus levy income to our clients to support social value initiatives in the local communities they serve.

General Terms and Conditions

LHC uses the FAC1 standard form of contract to manage our frameworks. The LHC pro forma, which should be read in conjunction with the FAC1 in published form, details the terms and conditions that govern the operation of the framework, including the procedures to call off projects under the framework. A free copy of the LHC proforma is available upon request. The FAC1 in standard published form can be purchased at a negotiated rate from ACA, by emailing office@acarchitects.co.uk and quoting discount code reference: LHCFAC2516102017.

THE PROCESS OF USING OUR FRAMEWORK





01392 574 100



www.swpa.org.uk



info@swpa.org.uk



[@SWPAProcure](https://twitter.com/SWPAProcure)



[swpa-south-west-procurement-alliance](https://www.linkedin.com/company/swpa-south-west-procurement-alliance)



[South West Procurement Alliance](https://www.youtube.com/South West Procurement Alliance)

IN ASSOCIATION WITH:

LHC

Trusted procurement for
better buildings and homes