

Request for Proposal



Request for Proposal (RFP) on behalf of Department for Business, Energy & Industrial Strategy (BEIS)

Subject Learning from low-cost, low carbon homes

Sourcing reference number UK SBS OJEU-CR16118BEIS



UK Shared Business Services Ltd (UK SBS)
www.ukpbs.co.uk

Registered in England and Wales as a limited company. Company Number 6330639.
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Section 1 – About UK Shared Business Services

Putting the business into shared services

UK Shared Business Services Ltd (UK SBS) brings a commercial attitude to the public sector; helping our customers improve efficiency, generate savings and modernise.

It is our vision to become the leading provider for our customers of shared business services in the UK public sector, continuously reducing cost and improving quality of business services for Government and the public sector.

Our broad range of expert services is shared by our customers. This allows our customers the freedom to focus resources on core activities; innovating and transforming their own organisations.

Core services include Procurement, Finance, Grants Admissions, Human Resources, Payroll, ISS, and Property Asset Management all underpinned by our Service Delivery and Contact Centre teams.

UK SBS is a people rather than task focused business. It's what makes us different to the traditional transactional shared services centre. What is more, being a not-for-profit organisation owned by its customers, UK SBS' goals are aligned with the public sector and delivering best value for the UK taxpayer.

UK Shared Business Services Ltd changed its name from RCUK Shared Services Centre Ltd in March 2013.

Our Customers

Growing from a foundation of supporting the Research Councils, 2012/13 saw Business Innovation and Skills (BEIS) transition their procurement to UK SBS and Crown Commercial Services (CCS – previously Government Procurement Service) agree a Memorandum of Understanding with UK SBS to deliver two major procurement categories (construction and research) across Government.

UK SBS currently manages £700m expenditure for its Customers.

Our Customers who have access to our services and Contracts are detailed [here](#).

Section 2 – About Our Customer

Department for Business, Energy & Industrial Strategy (BEIS)

The Department for Business, Innovation & Skills (BEIS) is the department for economic growth. The department invests in skills and education to promote trade, boost innovation and help people to start and grow a business. BEIS also protects consumers and reduces the impact of regulation.

BEIS is a ministerial department, supported by 47 agencies and public bodies.

Our priorities for 2016 to 2017 include:

- business and enterprise
- competitiveness and exports
- science and innovation
- apprenticeships and skills
- higher education
- labour markets

We have around 2,500 staff working for BEIS plus around 500 people working for UK Trade & Investment in the UK.

Our partner organisations include 9 executive agencies employing around 14,500 staff.

We have BEIS offices in London, Sheffield, Billingham, Cardiff, Darlington, Glasgow, Manchester, Nottingham, Runcorn and Watford.

Department for Business, Energy & Industrial Strategy achievements include:

- Funding 457,000 apprenticeship starts in 2010-11 Academic Year
- Committing £75 million to support innovation in technology-based SMEs
- Helping 25,000 UK businesses (mainly SMEs), employing over 13 million people, to make the most of opportunities for growth in overseas markets; Growth Accelerator is a new Department for Business funded-service to help up to 26,000 small and medium enterprises (SMEs) grow as much as they can over three years. Working with an experienced coach, businesses will receive a personalised growth plan, training and workshops, networking and peer to peer support. SMEs can also learn how to develop their leadership and management capability.
- With the Cabinet Office, leading the review of 1,200 regulations across Government as part of the Red Tape Challenge, more than half of which will be scrapped or improved.

<http://www.beis.gov.uk>

Section 3 – Working with UK Shared Business Services Ltd.

Section 3 – Contact details		
3.1	Customer Name and address	Department for Business, Energy, & Industrial Strategy 1 Victoria Street London SW1H 0ET
3.2	Buyer	Victoria.clewer@uksbs.co.uk
3.3	Buyer contact details	research@uksbs.co.uk
3.4	Estimated value of the Opportunity	£1,400,000
3.5	Process for the submission of clarifications and Bids	<p>All correspondence shall be submitted within the Emptoris e-sourcing tool. Guidance Notes to support the use of Emptoris is available here.</p> <p>Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.</p>

Section 3 - Timescales		
3.6	Date of posting of Contract advert to OJEU.	09/02/2017
3.7	Date RFP available to Bidders	13/02/2017
3.8	Bidder conference (if relevant)	N/A
3.9	Latest date / time RFP clarifications should be sent be received through Emptoris	07/03/2017 14.00
3.10	Latest date / time RFP clarification answers should be sent to all potential Bidders through Emptoris	14/03/2017
3.11	Closing date and time for Bidder to request RFP documents	21/03/2017 14.00
3.12	Closing date and time for Bidder to submit their response ('the deadline ').	21/03/2017 14.00

3.13	Clarifications and / or site visits (if required)	If required, clarification meetings will be held on 30 th March 2017 at 1 Victoria Street, London between 10:00-17:00. Bidders should ensure they are able to attend on this date.
3.14	Notification of proposed Contract award to successful and unsuccessful bidders	13/04/2017
3.15	Anticipated Contract Award Date	26/04/2017
3.16	Commencement of Contract	03/05/2017
3.17	Bid Validity Period	90 Days

Section 4 – Specification and about this procurement

A. Introduction

BEIS is seeking a contractor to undertake research to understand the cost of, performance of, and barriers to large-scale construction and take up of, low-cost, low-carbon homes.

An understanding is required on how these homes are built and how their occupants use their energy, alongside attitudes of occupants and potential purchasers of low cost, low carbon homes. Furthermore BEIS wishes to understand how the large scale uptake of low-cost, low-carbon homes can be accelerated and therefore seeks to understand the drivers for investment in homes of this type, and barriers to financing & construction.

Through this project, BEIS aims to gain an understanding of how low cost, low carbon homes might affect overall UK domestic energy demand in the future and what is possible at the cutting edge of innovation with regard to producing low-carbon homes. This study will support other work carried out by DCLG to provide evidence for current and future regulatory and voluntary standards for the building industry, reducing the requirement for future retrofit of the houses built today and in the future.

To date, research in this area has been conducted on discrete elements of low-cost, low-carbon houses, with limited research on following projects from conception to occupancy. This research considers low-cost, low-carbon housing from the start of the decision to invest, through design, planning and construction, all the way through to post occupancy evaluation for a large number of homes.

Going forward Government expects to see ~200,000 new UK homes to be built per year. By 2050 the domestic sector needs to be zero-carbon or near-zero-carbon if the 2050 GHG emissions target is to be met. If all homes constructed in future are built to a low-carbon standard BEIS's policy agenda would benefit by no-longer having to plan how to retrofit these homes to zero-carbon before 2050. Homes which require very little energy to run avoid the need for costly grid reinforcement and additional generation capacity and are beneficial to homeowners as energy bills are lower and healthy home environments are provided.

B. Aims

The aim of this research project is to evaluate and evidence a series of low cost, low carbon housing developments across the stage from project conception to the occupancy of the homes. The project will capture the lessons learnt, quality and standards achieved and the performance of the homes in terms of both fabric performance (i.e. energy performance under controlled conditions) and occupied performance.

C. Objectives

The overall objectives for this research are to:

- Investigate the drivers, barriers, attitudes and challenges, and how they are overcome, in the delivery of LoCoLoCO₂ homes from initial planning, financing, design and build, through to occupation.
- Explore what affects the levels of quality and standards delivered through the stages of the build processes.
- Explore how occupants understand their home and how that understanding affects the way they try to use it
- Explore modelled energy performance and actual measured performance of occupied homes. Identify the reasons for these differences (if any) between modelled and real performance
- Explore how LoCoLoCO₂ can impact the future of smart energy systems and future grid demand

D. Background to requirements

BEIS Project Management

The successful bidder will be managed by the BEIS project manager who sits in BEIS Science and Innovation for Climate and Energy, part of the Energy Transformation Group. It is expected that the BEIS project manager will take a hands on role in the project with regular contact with the successful bidder, in addition to regular project management meetings and reports in order to maintain stakeholder engagement.

Housing Development Case Studies

This research project is based on three housing developments used as case studies. The housing developments are described below. This project requires site visits to the developments alongside working with stakeholders in the surrounding area. The housing developers have signed a Collaboration Agreement with BEIS, specifying what can be expected from both parties.

Proposals should provide detailed costing based on the housing developments detailed below, in addition to a generic cost for conducting this research project on an additional housing development.

The housing developments to be studied as part of this project are self-defined as low-cost, low-carbon.

1. HAB Housing – Dunmail

HAB Housing's Dunmail scheme comprises a residential development on the site of the former Dunmail Primary School in Southmead, Bristol. The project is being delivered by Bristol Community Housing Foundation and HAB Housing Limited working in partnership with Bristol and Bath Regional Capital and Bristol City Council.

The scheme comprises 161 dwellings across a range of types from one-bed apartments to four bed houses, with a variety of tenures, arranged in a traditional legible street pattern that responds to the local context.

Furthermore, HAB's houses are highly environmentally sustainable, through the use of thermally efficient building fabric and airtight envelopes (HAB's standard fabric achieves Code level 4 for thermal performance, with airtightness at 2.5 m³/m²@50Pa), the integration of efficient PV systems, and landscaping and sustainable drainage designs that foster biodiversity.

At HAB's Dunmail scheme, they also looking to establish a 'Microgrid' system, incorporating onsite centralised battery storage to capture energy from the site wide PV systems, and deliver the energy back to the houses when they need it most (generally between the 5-7pm peak, when PV generation will have significantly reduced). Through this system, delivered through a Community ESCo mechanism, HAB are aiming to provide market beating energy prices to our residents, engender energy supply resilience, and significantly reduce carbon emissions associated with energy consumption by their residents following completion and handover.

Development Details: HAB Housing, Dunmail			
Development Address:	Former Dunmail School Dunmail Road Southmead Bristol BS10 6HQ	Main contractor:	HAB
		Local Authority:	Bristol City Council
		Housing association:	United Communities
		Architect:	Allford Hall Monaghan Morris
		Technology advisors:	Clean Energy Prospector (Microgrid advisor)
Details of Dwellings:			
Number of dwellings:	181	Dwelling types:	16
Breakdown of dwellings:	1 x 2 bed property shared ownership	20 x 2 bed property 15 x open market 1 x shared ownership 4 x ethical PRS	22 x 2 bed property 8 x open market 7 x affordable rent; 7 x ethical PRS
	1 x 4 bed property open market	16 x 3 bed property 7 x open market 9 x affordable rent 3 x shared ownership	1 x 3 bed property Affordable rent
	1 x 2 bed property open market	1 x 2 bed property ethical PRS	1 x 3 bed property 1 x open market
Current project schedule (October 2016)			
Milestone	Expected date	Milestone	Expected date
Submit planning for approval	September 2016	Builders on site	Spring 2017 to 2019
Dwelling hand over	June – December 2018	Occupant move in	June – December 2018
Monitoring equipment installed in the homes as standard			
Smart Meters (national grid supply)			
PV generation and export meters			
Microgrid import / export meters			

2. Pobl

Pobl are contracting a housing scheme in Neath scaling up the “Buildings as Power Stations” concept of housing developments. This scheme intends to be an exemplar “energy positive” project that will incorporate building integrated renewable technologies and energy efficient materials that can generate, store and release their own energy.

These dwellings do not use traditional construction forms, heating and ventilation systems. It relies heavily on the “landlord” managing and understanding the longer-term maintenance of the technologies and systems.

Development Details: Pobl			
Development Address:	Former Hafod Care Home, Wenham Place Neath SA11 3AH	Main contractor:	Not yet appointed
		Local Authority:	Neath Port Talbot County Borough Council
		Housing association:	Pobl Group
		Architect:	Pentan Architects
		Technology advisors:	SPECIFIC Innovation Knowledge Centre
Details of Dwellings:			
Number of dwellings:	16 All social rented	Dwelling types:	3
Breakdown of dwellings:	8 x 1 bedroom flats	4 x 2 bedroom houses	4 x 3 bedroom houses
Current project schedule (October 2016)			
Milestone	Expected date	Milestone	Expected date
Submit planning for approval	April – June 2017	Builders on site	October 2017 – December 2018
Dwelling hand over	January 2019	Occupant move in	January 2019
Monitoring equipment installed in the homes as standard			
TBC			

3. WeLink

WeLink are constructing 2 Storey Low Carbon Modular Housing using lightweight steel flat pack walls and floors to passive house insulation standards along with triple glazed windows. Heating will be provided either by electric radiators or air source heat pump with electricity provided by a Solar PV roof and battery storage linked to a smart energy management system. LED lighting will be used throughout.

Although there are only 6 properties detailed below, WeLink will have other properties within the area which are to be studied as part of this project. Exact further details of these additional developments will be provided when available. All developments are within the Your Housing Group (YHG) area.

Development Details: WeLink			
Development Address:	Rockfield Road Anfield Liverpool	Main contractor:	CTIEC
		Local Authority:	Liverpool
		Housing association:	YHG
		Architect:	Halsall Lloyd Partnership
		Technology advisors:	WElink BHS TESLA
Details of Dwellings:			
Number of dwellings:	6	Dwelling types:	2 Storey Terrace in a terrace of 6 with mono or dual pitch roof
Breakdown of dwellings:	All social housing		
Current project schedule (October 2016)			
Milestone	Expected date	Milestone	Expected date
Submit planning for approval	March 2017	Builders on site	April 2017
Dwelling hand over	April 2017	Occupant move in	April 2017
Monitoring equipment installed in the homes as standard			
Smart meters linked to remote system monitoring of energy consumption.			
We are looking to have one house linked to an EV charging point in the parking bay.			

E. Scope

The project requires the successful bidder to conduct the evaluation, surveying and monitoring of 3 housing developments which have been selected by BEIS. Equipment necessary for evidence and data collection which is not being installed within the homes by the housing developers should be provided by the successful bidder. The successful bidder is expected to source additional project partners to support areas of the evaluation where necessary.

This project does not require successful bidders to construct low cost, low carbon homes, or to source occupants for the homes to be studied within this project.

It is not expected that bidders contact the housing developers prior to bid submission; all bids should be based on the information provided within this document and through the submission of questions to UK SBS.

F. Requirement

Due to the nature of this project, there will be multiple stages needed in order to address the overall research need.

Stage 1 – Establish research time line

Once the contract is underway the contractor will be required to liaise with the housing development main contractors to understand their proposed timelines in order to produce a research plan specifically noting the following for each development:

- Financing, Planning and design stages
- Key individuals required for input
- Construction stages
- Occupancy

It is important that the contractor plan their engagement with the housing development main contractor in order to establish and maintain effective working relations. Present time scales are been provided in Section 4 to aid with producing a tender. Due to the nature of this project, flexibility in these time scales is vital.

A standard approach for each of the housing development is required in all areas of this project in order to ensure the research is comparable.

Stage 2: Understanding drivers, barriers, attitudes and challenges

We require data from the (future) occupants of the LoCoLoCO2 dwellings and key stakeholders in the design and delivery of LoCoLoCO2 on the drivers, barriers attitudes and challenges to establish why they have elected to live in a LoCoLoCO2 home and their attitudes towards the building phase until they move in upon completion.

In addition to the occupants, BEIS expects a minimum of 7 professionals involved in each of the developments to be engaged in evidencing the above questions, e.g. architects, project lead, main building contract, local planning authority etc. If relevant, contractors are welcome to propose external professional who add value to the project, however this is not essential.

We require evidence gathering to answer the following:

Demand & Occupancy

- What can be done to increase the number of construction companies utilising low-cost, low-carbon approaches when building new homes, as opposed to traditional methods of construction which are not low-carbon?
- What are the key differences between the outcome of the low-cost low-carbon homes in these developments and the potential outcomes of traditional homes when produced in higher volumes?
- What are the views of financiers of the housing developments on the mortgage ability and future resale potential of LoCoLoCO2 homes?

Supply & Build

- Which issues, specific to low-cost, low carbon homes, consume a significant amount of time and resource in the financing, design and build phases?
- What are the priority skills and competencies required for the construction of low-cost, low-carbon homes? Does the industry currently have the correct skills to deliver a larger roll out of these LoCoLoCO2 dwellings consistently to a high quality?
- What benefits, costs, risks or opportunities does building on a greater scale achieve and yield compared to single demonstrator homes? Bench marking should be established for single demonstrators from available literature.
- What are the key considerations in designing and building the LoCoLoCO2 developments included in this project?
- Are there any significant areas where changes to existing regulations (in particular building regulations) or support mechanisms would promote the uptake of LoCoLoCO2 housing developments? Are there any significant technical or business innovations which could lead to greater uptake?
- On reflection, what would the various stakeholders involved in the project have done different in order to achieve the project aims more cost effectively/quicker or exceed the project's performance?

- What are the principal cost drivers for these builds and what are the potential opportunities for future cost reductions for providing these homes at higher volume?
- What do the various project stakeholders believe are the major sources of cost reduction and performance improvements in comparisons to traditional homes?

Stage 3: Practical implications through the build process

We require regular monitoring of the build construction phase so that we understand the practical issues encountered as the development of LoCoLoCO2 dwellings progress, through on-site visits. It is expected that the contractor will establish a strong working relationship between themselves and the construction company, facilitating the ability to talk with the construction workers on-site. This will enable the contractor to gather information on the practical experiences from physically building a LoCoLoCO2 home compared to building a “regular” home.

During this process, we specifically require:

- Based on the developments plan of works, map the deviations between home/development design and physical build, including change in methods, sequencing of tasks and product /technology substitutions.
- Understanding of why the mapped changes were necessary and identify the future impact they posed on the delivery, cost, energy efficiency and attractiveness to occupant of the home / project. The level to which this is conducted is dependent on the number of changes identified.
- Which aspects of the design lead to the delivery of the low-cost, low-carbon element of these homes? How do these features relate to future energy bills, emission reductions and attractiveness to occupants?
- How familiar are the developments builders with the LoCoLoCO2 technologies installed and technical used?
- Are LoCoLoCO2 technologies easy to install correctly? We expect the contractor to work with BEIS on how best to define ‘correct’ in this project.
- Are LoCoLoCO2 technologies explained to occupants? Do they understand this information and use their technologies correctly? How effective is the technology in influencing behaviour change?
- Are there any issues of complexity in relation to the technologies that impact on the cost and/or performance of the home?
- What is the impact of installing and commissioning LoCoLoCO2 technologies on timescales for project delivery?

To understand the buildings fabric performance, monitoring/testing of the buildings thermal performance will be conducted, including:

- Interpretation of onsite audits
- In-situ co-heating testing
- U-value measurements of all elements within the home e.g. walls, floors, ceiling/roof, windows
- Ventilation/airtightness measurements
- Thermography tests alongside day time photographs (inside and out)
- Heat loss coefficient measurements

BEIS welcomes innovative methods of assessing the fabric performance of buildings. All methods should be appropriately evidenced with regards to reliability, accuracy and limitations.

Intrusive fabric testing that requires the property to be empty may be carried out for a maximum of 2 weeks. Any testing of a longer duration must be conducted with discrete equipment and none intrusive to the occupant’s living environment.

Proposals should include costing for building fabric performance monitoring/testing for both 2 and 5 homes.

Stage 4: Cost and energy performance of LoCoLoCO2

This stage is carried out upon completion and occupancy of the LoCoLoCO2 homes. The contractor is expected to record the energy consumption related to these buildings, occupant behaviour, experiences/expectations and any associated data, particularly internal & external temperatures and humidity.

Contractors should develop a series of benchmarks for energy performance of traditional, non LoCoLoCO2 homes. These benchmarks should be used to assess performance of the new LoCoLoCO2 properties.

The following questions are to be answered through the evaluation and monitoring of the low-cost, low-carbon homes prior to and during occupancy:

Home performance

- How do these LoCoLoCO2 homes perform during occupancy?
- How does energy consumption in occupied dwellings differ from estimated energy consumption of equivalent homes?
- Is there sufficient heating (water and space) provided in the coldest weather? If not what impact does secondary heating have on both electrical power demand (in kW) and total electricity and gas demand (in kWh)
- During occupancy, which considerations in the earlier stages (e.g. planning and building), should have been given greater consideration in order to achieve a LoCoLoCO2 home?
- How does actual, measured energy use in these properties compare to energy use in similar non-LoCoLoCO2 homes under similar conditions in respect to energy use, environment and occupant wellbeing?

Occupant's expectations, perceptions and behaviours

- What are the views of occupants on how easy it is to live well in these homes?
- What do occupants view as the best and worst elements of living in a LoCoLoCO2 home?
- Do occupant's behaviours change when living in a LoCoLoCO2 home, such as heating behaviours (temperature of heated rooms/duration of heating), electricity consumption and water usage? Is this behaviour different from that in their previous homes?
- Does living in a low-cost, low-carbon home encourage energy saving, 'good' behaviour?
- Does the lifestyle, demographic or behaviour of an occupant affect the way they use their home and does this have any impact on the amount of energy they consume?
- What considerations need to be made for occupants of different demographics and backgrounds when choosing to buy / rent a LoCoLoCO2 home?
- What are the primary social and technical causes for the change in behaviour (if any) and impact do they have?
- What kind of tariff structure would work best with this type of home e.g. time of use tariff, flat rate payment?

Wider considerations

- What is the difference in embodied carbon of the LoCoLoCO2 developments compared with 'standard' homes?
- What are the main reasons for good or poor performance of low energy and low carbon measures?
- How do different approaches to modelling the energy performance of dwellings differ from one another?
- How do these differ from SAP, which tools perform better, and why?
- How can smart/energy efficient technologies, used in new build, be used in retrofitting our existing housing stock to reduce the energy demand in homes?
- How can modern construction methods improve energy performance and improve completion times?
- How can better integration and commissioning of building services improve energy performance and improve completion times?

Physical monitoring of building energy consumption and data associated with energy consumption, particularly internal and external temperatures and humidity data. Accounting of the build costs and life cycle assessment of LoCoLoCO2.

Physical monitoring of the homes to understand how occupants use their homes will include:

- Minimum of half hourly electricity (and gas if applicable) recording
- Minimum of half hourly sub-metering of high usage appliances and circuits.
- Minimum of half hourly internal (minimum of 4 rooms – including kitchen, living, bathroom and main bedroom where applicable, ideally all internal spaces)
- Minimum of half hourly external temperature
- Minimum of half hourly internal humidity (minimum of 4 rooms – including kitchen, living, bathroom and main bedroom where applicable, ideally all internal spaces)
- Internal CO2 sensors
- Solar gain within home
- Window opening sensors
- Occupancy monitoring (room basis)

Where homes have sources of renewable energy, these should be monitored to assess their contribution to the home energy profile.

Proposals should include costing for physical monitoring of 10, and 25 homes – template provided.

All monitoring should be regularly reviewed for faults or transmission error, with an adequate response time to repair or replace faulty sensors. Bidders should provide details of how this will be achieved in their bid, including the level and frequency of monitoring.

Details of the monitoring equipment provided as standard by the housing developers is detailed in Section 4. Successful contractors should provide, install, and maintain all additional equipment and remove it at the end of the study.

Contractors should assess how the performance of the homes changes under occupancy in comparison to an equivalent 'standard' home of this type.

Stage 5: Dissemination

The outcomes of this research will be of interest to the following stakeholders:

- BEIS, DCLG and other interested government departments
- Academics & think tanks, e.g. the CCC, ACE, UKGBC.
- Building industry – developers
- Building industry – technology providers
- Government departments – DCLG / Department of Health / UKTI
- DNO's
- Local Authorities
- Social housing providers / Responsible Social Landlords
- Private Landlord
- Committee on Fuel Poverty

Compulsory dissemination routes for the project are:

- Publication of proposed research reports
- Progress presentations to BEIS (at least annually)
- Presentations to stakeholders
- Datasets, both raw and anonymised
- Bidders should provide BEIS further additional routes of disseminating outcomes to the stakeholders mentioned above, e.g. Online video series, workshops, printed literature etc.

G. Timetable

Since the housing developments are independently managed by each housing developer, the timescales are outside BEIS control. This means that the project will require a high degree of flexibility in the contract.

Anticipated timescales, as provided by the housing developers have been provided above. The first Stage of this project is for the contract to work alongside the Housing Developers to further refine the timescales for this project.

Stage	Milestone	Timescale	Potential for Milestone
A	Produce of project plan including timescales	May 2017	Yes
B	Conduct pre-build evaluation to understand the drivers, barriers, attitudes and challenges towards large scale, low cost, low carbon housing.	TBC - 2017/18	
C	Produce report on drivers, barriers, attitudes and challenges towards large scale, low cost, low carbon housing.	TBC - 2017/18	Yes
D	Carry out inspection of the housing development sites during the build stage, to evaluate the build quality, standards and processes.	TBC - 2017/18	
E	Produce report on the quality, standards and processes observed onsite and how this impacts on meeting the low cost, low carbon housing specification.	TBC - 2017/18	Yes
F	Conduct fabric testing of homes	TBC - 2018/19	
G	Produce details of a 'standard' series of homes which the low cost, low carbon homes will be benchmarked to	TBC - 2018/19	
H	Produce report on the fabric performance of the homes within the housing development benchmarked to 'standard' homes.	TBC - 2018/19	Yes
I	Conduct in home monitoring	TBC – 2018/19/20	
J	Produce report on the home energy monitoring (1 year minimum of monitoring)	TBC – 2018/19/20	Yes
K	Project learning dissemination	TBC – 2018/19/20	Yes
L	Project completion	March 2020	

Depending on timescales, reports will be published concluding learning from all 3 housing developments in 1 report or 3 separate reports, 1 for each housing development, which can be updated or combined as chapters of into a single report upon completion. This is to support the timely dissemination of learning from the project with housing developments due to complete at potentially staggered intervals.

First draft of all reports should be delivered within 4 weeks of the individual housing development completing that stage of work. Reports must be produced to a sufficiently high standard to be published. In most cases, this will require more than one draft. To demonstrate relevant experience in producing high quality reporting, contactors must specify who in the project team will be responsible for drafting the report, and specify who will be responsible for quality assurance before it comes to BEIS.

Payment will be made upon completion of the final report for each stage of the project, subject to BEIS's approval that the objectives detailed in the specification have been met, delivered on time, and the feedback given during the presentation of the draft report has been addressed.

H. Summary of costing

A breakdown of costing, mapped to the methodology should be provided using the tables below, in addition to the costing spread sheet supplied by UK SBS used for scoring purposes. The following tables detail costing for the housing developments detailed within the specification, in addition to a 'generic' housing development. Costs should be detailed for carrying out fabric testing for 2 and 5 homes per development, with occupancy monitoring costing for 10 and 25 homes per development.

Costing should be detailed using the tables below for:

- 3 Specified housing developments with fabric testing in 2 homes and occupancy monitoring in 10 homes per development.
- 3 specified housing developments with fabric testing in 5 homes and occupancy monitoring in 25 homes per development.
- Cost for including another 'generic' housing development with fabric testing in 2 homes and occupancy monitoring in 10 homes.
- Cost for including another 'generic' housing development with fabric testing in 5 homes and occupancy monitoring in 25 homes.

Section 5 – Evaluation model

5.1 Introduction

- 5.1.1 The evaluation process will be conducted to ensure that Bids are evaluated fairly to ascertain the bidders who can demonstrate the required skills qualities, technical ability and capacity, commercial stability and experience to ensure successful performance of the Contract.
- 5.1.2 The evaluation team may comprise staff from UK SBS, the Customer and any specific external stakeholders UK SBS deem required

5.2 Evaluation of Bids

- 5.2.1 Evaluation of Bids shall be based on a Selection questionnaire defined in the e-sourcing tool.

5.3. SELECTION questionnaire

- 5.3.1 The Selection questionnaire shall be marked against the following Selection pass / fail and scoring criteria.
- 5.3.2 The selection questionnaire shall be marked against the following Mandatory or discretionary pass / fail criteria.

Selection Pass/fail criteria		
Questionnaire	Q No.	Question subject
Selection Part A	SEL1.13	Contact details and declaration
Selection Part B	SEL2.2	Participation in a criminal organisation
Selection Part B	SEL2.3	Corruption
Selection Part B	SEL2.4	Fraud
Selection Part B	SEL2.5	Terrorist Offences or offences link to terrorist activities
Selection Part B	SEL2.6	Money laundering or Terrorist financing
Selection Part B	SEL2.7	Child Labour and other forms of trafficking in human beings
Selection Part B	SEL 2.8	Payment of tax or social security
Selection Part B	SEL 2.9	Self cleaning
Selection Part C	SEL3.2	Breach of environmental obligations
Selection Part C	SEL3.3	Breach of social obligations
Selection Part C	SEL3.4	Breach of labour law obligations
Selection Part C	SEL3.5	Bankruptcy
Selection Part C	SEL3.6	Guilty of grave professional misconduct
Selection Part C	SEL3.7	Distorting competition
Selection Part C	SEL3.8	Conflict of Interest
Selection Part C	SEL3.9	Prior involvement in procurement process
Selection Part C	SEL3.10	Prior performance of contract
Selection Part C	SEL3.11	Serious Misrepresentation

Selection Part C	SEL3.12	Withholding information
Selection Part C	SEL3.13	Unable to provide supporting documentation for ESPD
Selection Part C	SEL3.14	Influenced the decision making process
Selection Part D	SEL4.1	Audited accounts
Selection Part D	SEL4.2	Minimum financial threshold
Selection Part D	SEL4.3	Wider group / guarantee
Selection Part D	SEL4.4	Insurance
Selection Part E	SEL5.1	References
Selection Part E	SEL5.4	Compliance under Modern Slavery Act 2015
Selection Part E	SEL5.5	Health and Safety Policy
Selection Part E	SEL5.6	Enforcement/remedial orders in relation to the Health and Safety Executive
Selection Part E	SEL5.7	Breaching environmental legislation
Selection Part E	SEL5.8	Checking sub-contractors for infringement of environmental legislation
Selection Part E	SEL5.9	Unlawful discrimination
Selection Part E	SEL5.10	Checking sub-contractors for unlawful discrimination
Selection Part E	FOI1.1	Freedom of information
In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, UK SBS reserves the right to disqualify the Bidder and not consider evaluation of the any of the selection stage scoring methodology, nor the Award stage scoring methodology or Mandatory pass / fail criteria.		

5.3.3 Each Mandatory pass / fail question includes a clear definition of the requirements of a successful response to the question.

5.3.4 The evaluation model below shall be used for this RFP which will be determined to two decimal places.

5.3.5 Questions marked 'for information only' do not contribute to the scoring model.

Selection Evaluation of criteria

Each question will be judged on a score from 0 to 100, which shall be subjected to a multiplier to reflect the percentage of the evaluation criteria allocated to that question.

Where an evaluation criterion is worth 20% then the 0-100 score achieved will be multiplied by 20.

Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation: Score/Total Points available multiplied by 20 ($60/100 \times 20 = 12$)

Where an evaluation criterion is worth 10% then the 0-100 score achieved will be multiplied by 10.

Example if a Bidder scores 60 from the available 100 points this will equate to 6% by using the following calculation: Score/Total Points available multiplied by 10 ($60/100 \times 10 = 6$)

The same logic will be applied to groups of questions which equate to a single evaluation criterion.

The 0-100 score shall be based on (unless otherwise stated within the question):

0	The Question is not answered or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the selection question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.
60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.

All questions will be scored based on the above mechanism. Please be aware that there may be multiple evaluators. If so, their individual scores will be averaged (mean) to determine your final score as follows:

Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 40

Evaluator 3 scored your bid as 80

Evaluator 4 scored your bid as 60

Your final score will $(60+40+80+60) \div 4 = 60$

5.3.5 During the evaluation stage, the intention is that only Bidders who pass all the Mandatory and Discretionary requirements of the RFP will be considered for award stage evaluation.

5.4. AWARD questionnaire

5.4.1 The award questionnaire shall be marked against the following Mandatory or discretionary pass / fail criteria. Each Mandatory pass / fail question includes a clear definition of the requirements of a successful response to the question.

Award Pass/fail criteria

Questionnaire	Q No.	Question subject
Commercial	AW1.1	Form of Bid

Commercial	AW1.2	Bid validity period
Commercial	AW1.3	Certificate of bona fide Bid
Commercial	AW4.1	Compliance to the Contract Terms
Commercial	AW4.2	Changes to the Contract Terms
Price	AW5.1	Firm and fixed price
Commercial	AW5.5	E Invoice
Commercial	AW5.6	E Invoice implementation
Quality	AW6.1	Compliance to the Specification
Quality	PROJ1.1	Understanding of the Objectives
Quality	PROJ1.2	Project Plan and Risk Management
Quality	PROJ1.3	Methodology
Quality	PROJ1.4	Project Team and Capability to Deliver
-	-	Request for Quotation response – received on time within the e-sourcing tool
In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, UK SBS reserves the right to disqualify the Bidder and not consider evaluation of the any of the selection stage scoring methodology, nor the Award stage scoring methodology or Mandatory pass / fail criteria.		

5.4.2 The Award questionnaire shall be marked against the following Award scoring criteria.

5.4.3 The evaluation model below shall be used for this RFP which will be determined to two decimal places.

5.4.4 Questions marked 'for information only' do not contribute to the scoring model.

Award Scoring criteria			
Evaluation Justification Statement			
In consideration of this particular requirement UK SBS has decided to evaluate Potential Providers by adopting the weightings/scoring mechanism detailed within this RFP. UK SBS considers these weightings to be in line with existing best practice for a requirement of this type.			
Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	25%
Quality	Proj1.1	Understanding of the Objectives	15%
Quality	Proj1.2	Project Plan and Risk Management	15%
Quality	Proj1.3	Methodology	30%
Quality	Proj1.4	Project Team and Capability to Deliver	15%

These percentages will be further broken down to the following criteria:

PROJ1.2	Project Plan, Flexibility and Risk Management	
	Overall Weighting 15%	Score / 100
1	Project plan detailing milestones, deliverables, and timescales.	20
2	Flexible working, change management and contingencies.	30
3	Identification of key risks and risk management	30
4	Project process monitoring - time, cost and quality	20

PROJ1.3	Methodology	
	Overall Weighting 15%	Score / 100
1	Approach to pre-occupancy social research (stakeholders, builders etc.)	25
2	Approach to post-occupancy social research (occupants, stakeholders etc.)	15
3	Approach to technical fabric testing	25
4	Approach to technical home energy monitoring	25
5	Stakeholder engagement beyond housing developments	10

PROJ1.4	Project Team and Capability to Deliver	
	Overall Weighting 15%	Score / 100
1	List members of the project team and demonstrate their skills and expertise essential in relation to what they will be delivering on this project.	75
2	Approach to quality assurance	25

Award Evaluation of criteria

Non-Price elements

Each question will be judged on a score from 0 to 100, which shall be subjected to a multiplier to reflect the percentage of the evaluation criteria allocated to that question.

Where an evaluation criterion is worth 20% then the 0-100 score achieved will be multiplied by 20.

Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation: Score/Total Points available multiplied by 20 ($60/100 \times 20 = 12$)

Where an evaluation criterion is worth 10% then the 0-100 score achieved will be multiplied by 10.

Example if a Bidder scores 60 from the available 100 points this will equate to 6% by using the following calculation: Score/Total Points available multiplied by 10 ($60/100 \times 10 = 6$)

The same logic will be applied to groups of questions which equate to a single evaluation criterion.

The 0-100 score shall be based on (unless otherwise stated within the question):

0	The Question is not answered or the response is completely unacceptable.
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10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the selection question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.
60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.

All questions will be scored based on the above mechanism. Please be aware that there may be multiple evaluators. If so, their individual scores will be averaged (mean) to determine your final score as follows:

Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 40

Evaluator 3 scored your bid as 80

Evaluator 4 scored your bid as 60

Your final score will $(60+40+80+60) \div 4 = 60$

Price elements will be judged on the following criteria.

The lowest price for a response which meets the pass criteria shall score 100.

All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion.

For example - Bid 1 £100,000 scores 100.

Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80

Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.

Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.

Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.

Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50

In the example if a supplier scores 80 from the available 100 points this will equate to 40% by using the following calculation: Score/Total Points multiplied by 50 $(80/100 \times 50 = 40)$

The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price.

5.5. Evaluation process

5.5.1 The evaluation process will feature some, if not all, the following phases

Stage	Summary of activity
Receipt and Opening	<ul style="list-style-type: none">• RFP logged upon opening in alignment with UK SBS's procurement procedures.• Any RFP Bid received after the closing date will be rejected unless circumstances attributed to UK SBS or the e-sourcing tool beyond the bidder control are responsible for late submission.
Compliance check	<ul style="list-style-type: none">• Check all Mandatory requirements are acceptable to UK SBS.• Unacceptable Bids may be subject to clarification by UK SBS or rejection of the Bid.
Scoring of the Bid	<ul style="list-style-type: none">• Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the Selection criteria.
Clarifications	<ul style="list-style-type: none">• The Evaluation team may require written clarification to Bids
Re - scoring of the Bid and Clarifications	<ul style="list-style-type: none">• Following Clarification responses, the Evaluation team reserve the right to independently re-score the Bid and Clarifications and provide a commentary of their re-scoring justification against the Selection criteria.
Shortlisting of Bidders	<ul style="list-style-type: none">• UK SBS will shortlist the Bidders based on the Responses received and the Evaluation Model detailed in Section 5 of the RFP.
Validation of unsuccessful Bidders	<ul style="list-style-type: none">• To confirm contents of the letters to provide details of scoring and relative feedback on the unsuccessful Bidders Bid in comparison with the successful Bidders Bid.

Section 6 – Selection and award questionnaires

Section 6 – Selection questionnaire

6.1 Introduction

The Selection questionnaires are located in the within the e-sourcing tool.

Guidance on completion of the questions are is available at
<http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx>

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

Section 6 – Award questionnaire

6.2 The Award questionnaires are located within the e-sourcing tool.

6.3 Guidance on completion of the questions is available at
<http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx>

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

Section 7 – General information

7.1. Introduction

- 7.1.1 UK SBS wishes to establish a Contract for the provision of Low-cost, Low Carbon Homes. UK SBS is managing this procurement process in accordance with the Public Contracts Regulations 2015 (as may be amended from time to time) (the “Regulations”). This is a services Contract being procured under the OJEU Open Procedure
- 7.1.2 UK SBS is procuring the Contract for add for BEIS its exclusive use.
- 7.1.3 UK SBS logo, trademarks and other identifying marks are proprietary and may not be incorporated in the Companies response without UK SBS’s written permission.
- 7.1.4 The Bidder shall indemnify and keep indemnified UK SBS against all actions, claims, demands, proceedings, damages, costs, losses, charges and expenses whatsoever in respect of any breach by the Bidder of this document.
- 7.1.5 If there is any doubt with regard to the ambiguity of any question or content contained in this questionnaire then PLEASE ASK a clarification question, but please ensure that your question is via the formal clarification process in writing to the UK SBS representative nominated. No approach of any kind in connection with this opportunity should be made to any other person within, or associated with UK SBS. All information secured outside of this named contact shall have no legal standing or worth and should not be relied upon.
- 7.1.6 It remains the responsibility of the Bidder to keep UK SBS informed of any matter that may affect continued qualification
- 7.1.7 Prior to commencing formal evaluation, Submitted Responses will be checked to ensure they are fully compliant with the Pass / Fail criteria within the Evaluation model. Non-compliant Submitted Responses may be rejected by UK SBS. Submitted Responses which are deemed by UK SBS to be fully compliant will proceed to evaluation. These will be evaluated using the criteria and scores detailed in the matrix set out in [Section 5](#).
- 7.1.8 Following evaluation of the submitted Responses and approval of the outcome UK SBS intends to select a short list of Bidders to proceed to Award stage of this Procurement.
- 7.1.9 Whilst it is UK SBS’s [and any relevant Other Public Bodies] intention to purchase the majority of its services under this Contract Arrangement from the Supplier(s) appointed this does not confer any exclusivity on the appointed Suppliers. UK SBS and any relevant Other Public Bodies reserve the right to purchase any services and services (including those similar to the services covered by this procurement) from any Supplier outside of this Contract..
- 7.1.10 UK SBS reserves the right not to conclude a Contract as a result of the current procurement process. Bidders should review the contents of Section 7 paragraph 7.8.1 when considering submitting their Response.
- 7.1.11 The services covered by this procurement exercise have NOT been sub-divided into Lots.
- 7.1.12 UK SBS shall utilise the Crown Commercial Service (CCS – previously Government Procurement Service) Emptoris e-sourcing tool url <https://gpsesourcing.cabinetoffice.gov.uk/sso/jsp/login.jsp> to conduct this procurement. There will be no electronic auction following the conclusion of the evaluation of the Request for Proposal (RFP) responses. Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. All

enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool may be submitted to Crown Commercial Service, Telephone 0345 010 3503.

- 7.1.13 Please utilise the messaging system within the e-sourcing tool located at <https://gpsesourcing.cabinetoffice.gov.uk/sso/jsp/login.jsp> within the timescales detailed in [Section 3](#). if you have any doubt as to what is required or will have difficulty in providing the information requested. Bidders should note that any requests for clarifications may not be considered by UK SBS if they are not articulated by the Bidder within the discussion forum within the e-sourcing tool.
- 7.1.14 Bidders should read this document, RfX attachments, messages and the evaluation questionnaires carefully before completing the Response submission. Failure to comply with any of these instructions for completion and submission of the Submitted Response may result in the rejection of the Response. Bidders are advised therefore to acquaint themselves fully with the extent and nature of the goods/services/goods and services and contractual obligations. These instructions constitute the Conditions of Response. Participation in the RFP process automatically signals that the Bidder accepts these Conditions.
- 7.1.15 All material issued in connection with this RFP shall remain the property of UK SBS and/or as applicable relevant OPB and shall be used only for the purpose of this procurement. All Due Diligence Information shall be either returned to UK SBS or securely destroyed by the Bidder (at UK SBS's option) at the conclusion of the procurement
- 7.1.16 The Bidder shall ensure that each and every sub-contractor, consortium member and adviser abides by the terms of these instructions and the Conditions of Response.
- 7.1.17 The Bidder shall not make contact with any other employee, agent or consultant of UK SBS or any relevant OPB or Customer who are in any way connected with this procurement during the period of this procurement, unless instructed otherwise by UK SBS.
- 7.1.18 UK SBS shall not be committed to any course of action as a result of:
- 7.1.18.1 issuing this RFP or any invitation to participate in this procurement ;
 - 7.1.18.2 an invitation to submit any Response in respect of this procurement;
 - 7.1.18.3 communicating with a Bidder or a Bidder's representatives or agents in respect of this procurement; or
 - 7.1.18.4 any other communication between UK SBS and/or any relevant OPB (whether directly or by its agents or representatives) and any other party.
- 7.1.19 Bidders shall accept and acknowledge that by issuing this RFP UK SBS shall not be bound to accept any Response and reserves the right not to conclude a Contract for some or all of the services for which Responses are invited.
- 7.1.20 UK SBS reserves the right to amend, add to or withdraw all or any part of this RFP at any time during the procurement.
- 7.1.21 Bidders should not include in the Response any extraneous information which has not been specifically requested in the RFP including, for example, any sales literature, standard terms of trading etc. Any such information not requested but provided by the Bidder shall not be considered by UK SBS.
- 7.1.22 If the Bidder is a consortium, the following information must be provided: full details of the consortium; and the information sought in this RFP in respect of each of the consortium's constituent members as part of a single composite response. Potential Providers should provide details of the actual or proposed percentage shareholding of the constituent members within the consortium as indicated in the relevant section of the selection questionnaire SEL1.9 specifically refers. If a consortium is not proposing to form a corporate entity, full details of alternative proposed

arrangements should be provided as indicated in the relevant section of the RFP. However, please note UK SBS reserves the right to require a successful consortium to form a single legal entity in accordance with regulation 19(6) of the Regulations. UK SBS recognises that arrangements in relation to consortia may (within limits) be subject to future change. Potential Providers should therefore respond in the light of the arrangements as currently envisaged. Potential Providers are reminded that any future proposed change in relation to consortia must be notified to UK SBS so that it can make a further assessment by applying the selection criteria to the new information provided and consider rejection of the Response if UK SBS reasonably consider the change to have a material impact of the delivery of the viability of the Response.

7.2. Bidder conference

7.2.1 A Bidders' Conference will not be held in conjunction with this procurement.

7.3. Confidentiality

7.3.1 Subject to the exceptions referred to in paragraph 7.3.2, the contents of this RFP are being made available by UK SBS on condition that:

7.3.1.1 Bidders shall at all times treat the contents of the RFP and any related documents (together called the 'Information') as confidential, save in so far as they are already in the public domain;

7.3.1.2 Bidders shall not disclose, copy, reproduce, distribute or pass any of the Information to any other person at any time or allow any of these things to happen;

7.3.1.3 Bidders shall not use any of the Information for any purpose other than for the purposes of submitting (or deciding whether to submit) a Response; and

7.3.1.4 Bidders shall not undertake any publicity activity within any section of the media in relation to this procurement

7.3.2 Bidders may disclose, distribute or pass any of the Information to the Bidder's advisers, sub-contractors or to another person provided that either:

7.3.2.1 This is done for the sole purpose of enabling a Response to be submitted and the person receiving the Information undertakes in writing to keep the Information confidential on the same terms as if that person were the Bidder; or

7.3.2.2 The disclosure is made for the sole purpose of obtaining legal advice from external lawyers in relation to the procurement or to any Contract arising from it; or

7.3.2.3 The Bidder is legally required to make such a disclosure

7.3.3 In paragraphs 7.3.1 and 7.3.2 above the term 'person' includes but is not limited to any person, firm, body or association, corporate or incorporate.

7.3.4 UK SBS may disclose detailed information relating to Responses to its employees, agents or advisers and UK SBS may make any of the Contract documents available for private inspection by its officers, employees, agents or advisers. UK SBS also reserves the right to disseminate information that is materially relevant to the procurement to all Bidders, even if the information has only been requested by one Bidder, subject to the duty to protect each Bidder's commercial confidentiality in relation to its Response (unless there is a requirement for disclosure as explained in paragraphs 7.4.1 to 7.4.3 below).

7.3.5 All Central Government Departments and their Executive Agencies and Non Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the

Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

For these purposes, UK SBS may disclose within Government any of the Bidders documentation/information (including any that the Bidder considers to be confidential and/or commercially sensitive such as specific bid information) submitted by the Bidder to UK SBS during this Procurement. Subject to section 7.4 below, the information will not be disclosed outside Government. Bidders taking part in this RFP consent to these terms as part of the competition process.

- 7.3.6 From 2nd April 2014 the Government is introducing its new Government Security Classifications ("GSC") classification scheme to replace the current Government Protective Marking System ("GPMS"). A key aspect of this is the reduction in the number of security classifications used. All Bidders are encouraged to make themselves aware of the changes and identify any potential impacts in their Bid, as the protective marking and applicable protection of any material passed to, or generated by, you during the procurement process or pursuant to any Contract awarded to you as a result of this tender process will be subject to the new GSC from 2nd April 2014. The link below to the Gov.uk website provides information on the new GSC:

<https://www.gov.uk/government/publications/government-security-classifications>

- 7.3.7 UK SBS reserves the right to amend any security related term or condition of the draft contract accompanying this RFP to reflect any changes introduced by the GSC. In particular where this RFP is accompanied by any instructions on safeguarding classified information (e.g. a Security Aspects Letter) as a result of any changes stemming from the new GSC, whether in respect of the applicable protective marking scheme, specific protective markings given, the aspects to which any protective marking applies or otherwise. This may relate to the instructions on safeguarding classified information (e.g. a Security Aspects Letter) as they apply to the procurement as they apply to the procurement process and/or any contracts awarded to you as a result of the procurement process.

7.4 Freedom of information

- 7.4.1 In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA') and the Environmental Information Regulations 2004 (the 'EIR') (each as amended from time to time), UK SBS may be required to disclose information submitted by the Bidder to the UK SBS.
- 7.4.2 In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder should complete the Freedom of Information declaration question defined in the Question FOI1.2.
- 7.4.3 Where a Bidder identifies information as commercially sensitive, UK SBS will endeavour to maintain confidentiality. Bidders should note, however, that, even where information is identified as commercially sensitive, UK SBS may be required to disclose such information in accordance with the FoIA or the Environmental Information Regulations. In particular, UK SBS is required to form an independent judgment concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, UK SBS cannot guarantee that any information marked 'confidential' or "commercially sensitive" will not be disclosed.
- 7.4.4 Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to UK SBS and the Bidder should not attempt to answer the request without first consulting with UK SBS.
- 7.4.5 Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including RFP templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by UK SBS, and any contract entered into by UK SBS with its preferred supplier once the procurement is

complete. By submitting a response to this RFP Bidders are agreeing that their participation and contents of their Response may be made public.

7.5. Response Validity

- 7.5.1 Your Response should remain open for consideration for a period of 90 days. A Response valid for a shorter period may be rejected.

7.6. Timescales

- 7.6.1 [Section 3](#) of the RFP sets out the proposed procurement timetable. UK SBS reserves the right to extend the dates and will advise potential Bidders of any change to the dates.

7.7. UK SBS's Contact Details

- 7.7.1 Unless stated otherwise in these Instructions or in writing from UK SBS, all communications from Bidders (including their sub-contractors, consortium members, consultants and advisers) during the period of this procurement must be directed through the e-sourcing tool to the designated UK SBS contact.
- 7.7.2 All enquiries with respect to access to the e-sourcing tool may be submitted to Crown Commercial Service, Telephone 0345 010 3503.
- 7.7.3 Bidders should be mindful that the designated Contact should not under any circumstances be sent a copy of their Response outside of the e-sourcing tool. Failure to follow this requirement will result in disqualification of the Response.

7.8. Preparation of a Response

- 7.8.1 Bidders must obtain for themselves at their own responsibility and expense all information necessary for the preparation of Responses. Bidders are solely responsible for all costs, expenses and other liabilities arising in connection with the preparation and submission of their Response and all other stages of the selection and evaluation process. Under no circumstances will UK SBS, or any of their advisers, be liable for any such costs, expenses or liabilities borne by Bidders or their sub-contractors, suppliers or advisers in this process.
- 7.8.2 Bidders are required to complete and provide all information required by UK SBS in accordance with the Conditions of Response and the Request for Proposal. Failure to comply with the Conditions and the Request for Proposal may lead UK SBS to reject a Response.
- 7.8.3 UK SBS relies on Bidders' own analysis and review of information provided. Consequently, Bidders are solely responsible for obtaining the information which they consider is necessary in order to make decisions regarding the content of their Responses and to undertake any investigations they consider necessary in order to verify any information provided to them during the procurement.
- 7.8.4 Bidders must form their own opinions, making such investigations and taking such advice (including professional advice) as is appropriate, regarding their Responses, without reliance upon any opinion or other information provided by UK SBS or their advisers and representatives. Bidders should notify UK SBS promptly of any perceived ambiguity, inconsistency or omission in this RFP, any of its associated documents and/or any other information issued to them during the procurement.
- 7.8.5 Bidders must ensure that each response to a question is within any specified word count. Any responses with words in excess of the word count will only be considered up to the point where they meet the word count, any additional words beyond the volume defined in the word count will not be considered by the evaluation panel.
- 7.8.6 Bidders must ensure that each response to a question is not cross referenced to a response to another question. In the event of a Bidder adding a cross reference it will not be considered in evaluation.

7.9. Submission of Responses

- 7.9.1 The Response must be submitted as instructed in this document through the e-sourcing tool. Failure to follow the instruction within each Section of this document, to omit responses to any of the questions or to present your response in alignment with any guidance notes provided may render the Response non-compliant and it may be rejected.
- 7.9.2 UK SBS may at its own absolute discretion extend the closing date and the time for receipt of Responses specified [Section 3](#).
- 7.9.3 Any extension to the RFP response period will apply to all Bidders.
- 7.9.4 Any financial data provided must be submitted in or converted into pounds sterling. Where official documents include financial data in a foreign currency, a sterling equivalent must be provided. Failure to adhere to this requirement will result in the Response not being considered.
- 7.9.5 UK SBS does not accept responsibility for the premature opening or mishandling of Responses that are not submitted in accordance with the instructions of this document.
- 7.9.6 The Response and any documents accompanying it must be in the English language
- 7.9.7 Bidders must submit their response through the e-sourcing tool:
- 7.9.8 Responses will be submitted any time up to the date indicated in [Section 3](#). Responses received before this deadline will be retained in a secure environment, unopened until this deadline has passed.
- 7.9.9 Responses received after the date indicated in [Section 3](#) shall not be considered by UK SBS unless the Bidder can justify the reason for the delay.
 - 7.9.9.1 The Bidder must demonstrate irrefutable evidence in writing they have made best endeavours to ensure the Response was received on time and that the issue was beyond their control.
 - 7.9.9.2 Any request for a late Response to be considered must be emailed to bids@uksbs.co.uk in advance of 'the deadline' if a bidder believes their Response will be received late.
 - 7.9.9.3 UK SBS reserves the right to accept or reject any late Response without justification to the affected Bidder and make no guarantee it will consider any request for a late Response to be considered.

7.10. Canvassing

- 7.10.1 Any Bidder who directly or indirectly canvasses any employee, or agent of UK SBS or its members or any relevant OPB or any of its employees concerning the establishment of the Contract or who directly or indirectly obtains or attempts to obtain information from any such officer, member, employee or agent or concerning any other Bidder, Response or proposed Response will be disqualified.

7.11. Disclaimers

- 7.11.1 Whilst the information in this RFP, Due Diligence Information and supporting documents has been prepared in good faith, it does not purport to be comprehensive nor has it been independently verified.
- 7.11.2 Neither UK SBS, nor any relevant OPB's nor their advisors, nor their respective directors, officers, members, partners, employees, other staff or agents:
 - 7.11.2.1 makes any representation or warranty (express or implied) as to the accuracy, reasonableness or completeness of the RFP; or

7.11.2.2 accepts any responsibility for the information contained in the RFP or for their fairness, accuracy or completeness of that information nor shall any of them be liable for any loss or damage (other than in respect of fraudulent misrepresentation) arising as a result of reliance on such information or any subsequent communication.

7.11.3 Any persons considering making a decision to enter into contractual relationships with UK SBS and/or, as applicable, relevant OPB following receipt of the RFP should make their own investigations and their own independent assessment of UK SBS and/or, as applicable, relevant OPB and its requirements for the goods/services/goods and services and should seek their own professional financial and legal advice. For the avoidance of doubt the provision of clarification or further information in relation to the RFP or any other associated documents (including the Schedules) is only authorised to be provided following a query made in accordance with Paragraph 7.15 of this RFP.

7.12. Collusive behaviour

7.12.1 Any Bidder who:

7.12.1.1 fixes or adjusts the amount of its Response by or in accordance with any agreement or arrangement with any other party; or

7.12.1.2 communicates to any party other than UK SBS or, as applicable, relevant OPB the amount or approximate amount of its proposed Response or information which would enable the amount or approximate amount to be calculated (except where such disclosure is made in confidence in order to obtain quotations necessary for the preparation of the Response or insurance or any necessary security); or

7.12.1.3 enters into any agreement or arrangement with any other party that such other party shall refrain from submitting a Response; or

7.12.1.4 enters into any agreement or arrangement with any other party as to the amount of any Response submitted; or

7.12.1.5 offers or agrees to pay or give or does pay or give any sum or sums of money, inducement or valuable consideration directly or indirectly to any party for doing or having done or causing or having caused to be done in relation to any other Response or proposed Response, any act or omission,

shall (without prejudice to any other civil remedies available to UK SBS and without prejudice to any criminal liability which such conduct by a Bidder may attract) be disqualified.

7.13. No inducement or incentive

7.13.1 The RFP is issued on the basis that nothing contained in it shall constitute an inducement or incentive nor shall have in any other way persuaded a Bidder to submit a Response or enter into the Contract or any other contractual agreement.

7.14. Acceptance of the Contract

7.14.1 The Bidder in submitting the Response undertakes that in the event of the Response being accepted by UK SBS and UK SBS confirming in writing such acceptance to the Bidder, the Bidder will within 60 days of being called upon to do so by UK SBS execute the Contract in the form set out in the Contract Terms or in such amended form as may subsequently be agreed.

7.14.2 UK SBS shall be under no obligation to accept the lowest priced or any Response.

7.15. Queries relating to the Response

7.15.1 All requests for clarification about the requirements or the process of this procurement shall be made in through the e-sourcing tool unless where the e-sourcing tool is unavailable due to Emptoris

or Crown Commercial Service system maintenance or failure when a clarification by email to the contact defined in [Section 3](#).

- 7.15.2 UK SBS will endeavour to answer all questions as quickly as possible, but cannot guarantee a minimum response time.
- 7.15.3 In the event of a Bidder requiring assistance uploading a clarification to the e-sourcing portal they should use the contact details defined in [Section 3](#).
- 7.15.4 No further requests for clarifications will be accepted after 5 days prior to the date for submission of Responses.
- 7.15.5 In order to ensure equality of treatment of Bidders, UK SBS intends to publish the questions and clarifications raised by Bidders together with UK SBS's responses (but not the source of the questions) to all participants on a regular basis.
- 7.15.6 Bidders should indicate if a query is of a commercially sensitive nature – where disclosure of such query and the answer would or would be likely to prejudice its commercial interests. However, if UK SBS at its sole discretion does not either; consider the query to be of a commercially confidential nature or one which all Bidders would potentially benefit from seeing both the query and UK SBS's response, UK SBS will:
 - 7.15.6.1 invite the Bidder submitting the query to either declassify the query and allow the query along with UK SBS's response to be circulated to all Bidders; or
 - 7.15.6.2 request the Bidder, if it still considers the query to be of a commercially confidential nature, to withdraw the query prior to the end of the closing date and time for Bidder clarifications.
- 7.15.7 UK SBS reserves the right not to respond to a request for clarification or to circulate such a request where it considers that the answer to that request would or would be likely to prejudice its commercial interests.

7.16. Amendments to Response Documents

- 7.16.1 At any time prior to the deadline for the receipt of Responses, UK SBS may modify the RFP by amendment. Any such amendment will be numbered and dated and issued by UK SBS to all prospective Bidders. In order to give prospective Bidders reasonable time in which to take the amendment into account in preparing their Responses, UK SBS may, at its discretion, extend the time and/or date for receipt of Responses.

7.17. Modification and withdrawal

- 7.17.1 Bidders may modify their Response where allowable within the e-sourcing tool. No Response may be modified after the deadline for submission of Responses.
- 7.17.2 Bidders may withdraw their Response at any time prior the deadline for submission of Responses [or any other time prior to accepting the offer of a Contract]. The notice to withdraw the Response must be in writing and sent to UK SBS by recorded delivery or equivalent service and delivered to UK SBS at UK Shared Business Services Ltd, Procurement Policy Manager, Polaris House, North Star Avenue, Swindon, Wiltshire, SN2 1ET

7.18. Right to disqualify or reject

- 7.18.1 UK SBS reserves the right to reject or disqualify a Bidder where
 - 7.18.1.1 the Bidder fails to comply fully with the requirements of this Request for Proposal or presents the response in a format contrary to the requirements of this document; and/or
 - 7.18.1.2 the Bidder is guilty of serious misrepresentation in relation to its

Response; expression of interest; or the Response process; and/or

- 7.18.1.3 there is a change in identity, control, financial standing or other factor impacting on the selection and/or evaluation process affecting the Bidder.

7.19. Right to cancel, clarify or vary the process

7.19.1 UK SBS reserves the right to:

- 7.19.1.1 cancel the evaluation process at any stage; and/or
- 7.19.1.2 require the Bidder to clarify its Response in writing and/or provide additional information. (Failure to respond adequately may result in the Bidder not being selected),

7.20.. Notification of award

- 7.20.1 UK SBS will notify the successful Bidder of the Contract award in writing and will publish an Award Notice in the Official Journal of the European Union in accordance with the Regulations within 30 days of the award of the contract.
- 7.20.2 As required by the Regulations all unsuccessful Bidders will be provided with an email advising the outcome of the submission of their RFP response.

Appendix ‘A’ Glossary of Terms

TERM	MEANING
“UK SBS”	means UK Shared Business Services Ltd herein after referred to as UK SBS.
“Bid”, “Response”, “Submitted Bid”, or “RFP Response”	means the Bidders formal offer in response to this Request for Proposal
“Bidders”	means the organisations being invited to respond to this Request for Proposal
“Central Purchasing Body”	means a duly constituted public sector organisation which procures goods/services for and on behalf of contracting authorities
“Conditions of Bid”	means the terms and conditions set out in this RFP relating to the submission of a Bid
“Contract”	means the agreement to be entered by UK SBS and the Supplier following any award under the procurement
“Contracting Bodies”	means UK SBS and any other contracting authorities described in the OJEU Contract Notice
“Customer”	means the legal entity (or entities) for which any Contract agreed will be made accessible to.
“Due Diligence Information”	means the background and supporting documents and information provided by UK SBS for the purpose of better informing the Bidders responses to this Request for Proposal
"EIR"	mean the Environmental Information Regulations 2004 together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such regulations
FoIA	means the Freedom of Information Act 2000 and any subordinate legislation made under such Act from time to time together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such legislation
“Lot”	means a discrete sub-division of the requirements
“Mandatory”	Means a pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
“OJEU Contract Notice”	means the advertisement issued in the Official Journal of the European Union
“Order”	means an order for served by any Contracting Body on the Supplier
“Other Public Bodies”	means all Contracting Bodies except UK SBS
“Request for Proposal” or “RFP”	means this Request for Proposal documentation and all related documents published by UK SBS and made available to Bidders and includes the Due Diligence Information. NOTE: This document is often referred to as an Invitation to Tender within other organisations
“Supplier”	means the organisation awarded the Contract
“Standard Goods /Services”	means any goods/services set out at within Section 4 Specification

Appendix B – Option 1

[illegible]

Table to be included in answer to Proj1.3 – Methodology. Template available via the e-Sourcing portal.

Appendix C – Option 2

[illegible]

Table to be included in answer to Proj1.3 – Methodology. Template available via the e-Sourcing portal.

Appendix D – Additional Housing Development Option 1

[illegible]

Table to be included in answer to Proj1.3 – Methodology. Template available via the e-Sourcing portal.

Appendix E – Additional Housing Development Option 2

[illegible]

Table to be included in answer to Proj1.3 – Methodology. Template available via the e-Sourcing portal.