

Direct Award Report

Heating & Renewables (2020-24)

Lot 5 – QA & Asset Management

Rooftop Housing Group

Ref: 16417

October 2022



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Document Control

Version	2
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Member Approved For Issue		

1. Project Particulars

Document Type	Direct Award Report
Project Ref	16417
Framework	Heating & Renewables (2020-24)
Lot	5 – QA & Asset Management
Fusion21 Member	Rooftop Housing Group 70 High Street Evesham Worcestershire WR11 4YD
Issue Date	25/10/2022
Approx Value	£70,000.00
Contract Term	3 Years
Fusion21 Management Fee	3.5 %

2. Introduction

Rooftop Housing Group is carrying out a programme of gas and electrical technical audits. This document outlines the process undertaken to identify the supplier eligible for a Direct Award under Lot-5 of Fusion21's Heating & Renewables (2020-24) and to demonstrate such an award represents value for money.

3. Framework Procurement

In accordance with EU public procurement legislation a procurement exercise took place with a Contract Notice [2019/S 195-473099](#) and a corresponding Contract Award Notice [2020/S 024-055261](#) published in the Official Journal of the European Union (OJEU). After bid compliance checks and Supplier Selection, bids were evaluated using Most Economical and Advantageous Tender criteria (MEAT). Suppliers were ranked on their Framework submissions based on 40% cost / 60% quality. This resulted in a select list of contractors with which Fusion21 entered into Framework Agreements for the Fusion21 Heating & Renewables (2020-24) Lot-5. The Framework commenced on January 2020, and is open for Fusion21 Members to use.

4. Framework Tender Process

4.1. Supplier Selection

A total of 9 contractors applied to join the Fusion21 Heating & Renewables (2020-24) for Lot-5. Fusion21 checked contractors' accreditations, financial standing, arrangements for quality, health & safety etc. and 8 contractors passed supplier selection.

4.2. Evaluation of Lot-5

Suppliers on the Fusion21 Heating & Renewables (2020-24) Lot-5 were evaluated and ranked based on the award criteria of 40% Cost /60% Quality. 8 suppliers were successfully appointed to Lot-5 of the Framework as shown below.

- CORGI Technical Services Ltd
- David Miles and Partners Ltd
- Gas Advisory Services TA Phoenix Compliancy Management
- Gas Contract Services
- ICON Training & Assessment Ltd
- Morgan Lambert Limited
- NICEIC Consulting TA Certsure LLP
- Pennington Choices Ltd

5. Call-off Process

Rooftop Housing Group is seeking to appoint a supplier to deliver 3rd party quality assurance audits for gas and electrical works & services carried out by or on behalf-of Rooftop Housing Group. Fusion21 revisited the Framework evaluation to identify the top-ranked contractor fulfilling the Direct Award criteria in the Framework Agreement. The table below shows the top rank suppliers for Lot 5 in the West Midlands, in rank order:

West Midlands		
Supplier Name	Rank	Overall Score
Gas Contract Services Ltd	1	88.89
Morgan Lambert	2	88.08
CORGI Technical Services Ltd	3	84.25
Phoenix Compliancy Management (G.A.S Ltd)	4	77.63
Certsure LLP	5	76.33
Pennington Choices Ltd	6	69.68

As an incumbent supplier, Corgi Technical Services are currently working with Rooftop Housing Group to advise on their corporate Statutory Compliance strategies around gas and electrical service, maintenance, installation, and disposals. In line with Schedule 13 of the Heating & Renewables Framework Agreement, Rooftop Housing Group have demonstrated sufficient rationale to Direct Award off-rank as per clause 1.1.1, and 1.1.2.

Extract from Heating & Renewables Framework 2020-24

SCHEDULE 13

Direct Call-Off and Placing of Orders

1.1. A Member/Fusion21 may instruct provision of Services and/or the carrying out of Works without reopening competition by applying the terms of the Call-Off Contract, the Supplier's prices contained in its Pricing Schedule(s), the Brief/Specification (as may be tailored more particularly to the requirements for the Call-Off Contract to be used) to select a Supplier having regard to one or more of the following:

- 1.1.1 The Member's requirements and business needs by reference to the Brief/Specification for the provision of Services and/or carrying out Works; and/or
- 1.1.2 Where the Member can evidence value for money based on a Total Cost of Ownership approach; and/or
- 1.1.3 Where relevant to the ranking of the Supplier in the procurement exercise the subject matter of the Invitation to Tender; and/or
- 1.1.4 The geographical location in which those Works and Services are to be performed; and/or
- 1.1.5 The number of Call-Off Contracts currently awarded and to which organisation; and/or
- 1.1.6 The performance of the Supplier under any Call-Off Contracts currently awarded to it.

1.2. The Direct Selection process will be undertaken using the following:

1.	Direct Award	Selecting a supplier, without reopening competition, based on the terms of the Framework Agreement utilising the costs and rates provided within the framework for the completion of specific items of work
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1.3. As part of the procedure referred to in clause 1.1 and 1.2 the Supplier will agree the scope of the Services and/or Works, the Plans and Proposals as they apply and its prices (using the Pricing Schedule(s)) in respect of the Works and Services and its acceptance of the terms of the Call-Off Contract.

1.4. Fusion21 may refresh the scores awarded to Suppliers on a frequency no greater than every 12 months (or six months in Framework Year 1 to align with the price mechanism review Clause 22) for the purpose of re-ranking the framework order. Such re-ranking will be undertaken based on the initial Framework award criteria. On rescoring Supplier performance Fusion21 will provide all Suppliers with their organisation(s) latest performance ranking.

6. Award Due Diligence

The following information was checked for Corgi technical Services Ltd on 24/10/2022. The criteria for the colour coding is included in Appendix A.

Area	Assessment	Result	RAG
Financial	D&B Overall Business Risk Rating	Low	●
Financial	D&B Failure Score	Low Risk - 88	●
Insurances	Employers Liability Insurance	£10m – Expiry 29/06/2023	●
Insurances	Public Liability Insurance	£10m – Expiry 29/06/2023	●
Insurances	Product Liability Insurance	£10m – Expiry 29/06/2023	●
Insurances	Professional Indemnity Insurance	£5m – Expiry 06/07/2023	●
Registrations	ICO Registration	Z213595X – Exp 04/03/2023	●
Key Accreditation(s)	SSIP, Constructionline		●

In compiling the above information Fusion21 has undertaken a basic due diligence exercise that indicates the financial stability and competency of the supplier identified for this contract. Members should satisfy themselves as to the level of diligence they require and the standing of the supplier before making an award decision.

7. Fusion21 Summary

Rooftop Housing Group is seeking a supplier to carry out a programme of 3rd party quality assurance audits for gas and electrical works & services carried out by or on behalf-of Rooftop Housing Group. Based on Rooftop Housing Group's requirements, and in accordance with the original Framework evaluation, Fusion21 is satisfied that the appointment of Corgi Technical Services as the most appropriate supplier for this category of work in line with clause 1.1.2. of Schedule 13 of the Framework Agreement, is a compliant route to market.

Note: In accordance with regulation 112 of Public Contracts Regulations 2015 and Crown Commercial Services Procurement Policy Note [09/21](#), you may be required to publish a contract award on Contracts Finder. If so, please make sure you do this as Fusion21 is unable to do it for you.

Appendix A – Due Diligence Criteria

Dun & Bradstreet Overall Business Risk Assessment

The Overall Business Risk is a high-level prediction of the company's risk of paying its bills extremely late, or its likelihood of going out of business. It is a comprehensive evaluation that considers factors such as trade payments, risk indicators, financial data, as well as a business' size and years in operation. It scores businesses on a five-point scale, from low to high risk, with additional statements describing the business's current and future health.

Low	Low-Moderate	Moderate	Moderate-High	High
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Further information about D&B's Risk Assessment: [D&B Business Credit Reports](#)

Dun & Bradstreet Failure Score

The D&B Failure Score predicts the likelihood that an organisation will obtain legal relief from its creditors or cease operations over the next 12 month period. The Failure scorecard also looks for events signalling the onset of failure, such as a meeting of creditors, administrator appointed, bankruptcy, receiver appointed, and petition for winding-up.

Failure Score	Probability of Failure
86-100	Minimum risk
51-85	Lower than average risk
11-50	Higher than average risk
1-10	High risk
-	Insufficient information

Further information about D&B's Failure Score: "[A Guide to Dun & Bradstreet's Predictive Indicators](#)".

Insurances and Accreditations

Fusion21's RAG colour coding is as follows:

Moderate risk would be where a certificate is due for renewal within 30 days or (for example) an inappropriate insurance cover level. High would be includes the unaccredited or the uninsured.

Low	Moderate	High
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