Request for Quotation (RFQ)

|  |
| --- |
| Right to Buy Housing Valuations for Exeter City Council 2018: |

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**PART A - INVITATION TO QUOTE AND INFORMATION FOR APPLICANTS**

|  |
| --- |
| **Basic Contract Information** |
| Contract Title | Right to Buy Housing Valuations for Exeter City Council 2018. |
| Contract Length | This will be a three year fixed contract. |
| Basic Description of Services | To inspect the applicant’s home and to provide the right to buy valuation report within the required timescale to the specification and terms and conditions of this contract. |

Section 1 – Instructions for Completion

This document consists of four parts –

**Part A**: instructions, timetable and evaluation criteria. There are no sections for the Applicant to fill in in this section.

**Part B**: must be returned by the Applicant. There are various sub-sections which must be filled in.

**Part C**: must be returned by the Applicant. Includes schedules for commercially sensitive information, the form quotation and declarations.

**Part D**: the Appendices include a glossary. There are no sections for the Applicant to fill out in this section. (Terms and Conditions to be completed by successful applicant before award of contract).

Any information relating to the Council and supplied by the Council shall be kept by the Applicant in strictest confidence.

Applicants are advised that the Council is not bound to accept the lowest quote submitted, nor to reimburse any expense incurred during the process.

The Council reserves the right to award the business in whole to one Applicant, in part to more than one Applicant or to make no award at all.

**1.1 Quote Enquiries**

All enquiries and clarifications should be directed to the Authorised Officer shown below and no later than 4 days before the due date for the return of quotes:

|  |
| --- |
| **Authorised Officer Details** |
| Name: | Vicki Philpott |
| Telephone Number: | 01392 265123 |
| E-mail | Victoria.philpott@exeter.gov.uk |

**1.2 Quote Format**

All Quotes must be written in English and costs submitted are to be presented in Pounds Sterling, exclusive of VAT, but inclusive of all other costs where not stated in the Pricing Document.

Where details are provided by the Applicant in literature that they submit in connection with the Quote, they must ensure that clear cross-references are given to the Council.

**1.3 Quote Submission Procedure**

The Quote must be submitted electronically to: **ECCTenders@exeter.gov.uk** by no later than **12:00 hours (noon) on 7th August 2018.**

In an e-mail clearly marked with the title of the RFQ. Please note that all electronic submissions must be in Microsoft Word (.doc or .docx file) and compatible with Windows 7. Drawings or charts should be embedded or included as .dwf or .jpg file or in printed document format (.pdf) for use with Adobe Acrobat.

**1.4 Quote Validity Period**

Quotes must remain valid for acceptance for a period of 3 months from the Quote return date.

**Section 2 - Quote Timetable**

This procurement will follow a clear, structured and transparent process at all times, to ensure that all Applicants are treated equally. The key dates for this procurement (Timetable) are currently anticipated to be as follows:

|  |  |
| --- | --- |
| **Stage / Action** | **Date** |
| Issue RFQ documents | 10/07/18 |
| Closing date for submissions in response to this document. | 07/08/18 |
| Evaluation of submissions | 08/08/18 |
| Decision and notification to suppliers | 13/08/18 |
| Contract start | 03/09/18 |

**Section 3 - Evaluation Approach**

**3.1 Evaluation Criteria**

Bids will be evaluated in two parts:

1. Selection Criteria
2. Pricing Document

The first element the Council will evaluate is the Selection Criteria (SQ). Applicants not satisfying the elements of the RFQ will, at the discretion of the Council, be excluded from the remainder of the evaluation process and their bid shall not be considered further.

Applicants who satisfy the Selection Criteria will have the remainder of their bid evaluated.

**3.2 Selection Criteria**

The purpose of the SQ stage is to evaluate response in relation to the mandatory exclusion criteria (Is expected to be completed in full). In the event that any bidder fails to pass the SQ stage they will not be considered.

**3.3 Price Evaluation**

The Pricing Document contains the details and requirements relating to the price element of this RFQ

**3.4 Negotiations**

Following evaluation, the Council reserves the right to enter into negotiations with the Applicants on all or some elements of their Quote.

The Council shall conduct the negotiation for the purposes and with the aim of:

* Identifying the best Quote in order to award the Contract
* Adapting the Quote to the requirements specified in the RFQ Documents

During negotiations the Council shall ensure equal treatment among the Applicants. Negotiations may be conducted by telephone or in a face to face meetings. If a face to face meeting is required then these meetings will be treated as confidential between the Council and the individual Applicant. A formal record will be taken of the meeting.

**3.5 Notification of Award**

The Council will notify all Applicants of the Council’s award decision.

**PART B – QUOTE RETURN**

|  |
| --- |
| Right to Buy Housing Valuations for Exeter City Council 2018: |

|  |
| --- |
| Name of Applicant:Date: |

**Section 4 - Quote Completion Documentation**

**4.1 Selection Criteria**

**Explanatory Notes**

Applicants are required to complete all questions in this section which have space for answers. Some sections refer to criteria which are not applicable to this RFQ. This will be clearly marked with “Not Applicable to this RFQ”, and you are not required to answer these sections.

All responses provided must be clearly referenced to the questions to which they relate. Copies of certificates or policies will need to be provided by the successful supplier before any contract or purchase order is placed with them.

All applicable sections of the following Selection Criteria must be completed. Failure to do so may result in your submission being excluded from further evaluation. Where the answer is a statement of fact, it must be accurate and supported by documentary evidence as appropriate. It is the Applicant’s responsibility to ensure that the Council is not misled.

It is the responsibility of the Applicant to inform the Council of any matter that may affect the Applicant’s continued qualification.

**4.2 Financial Matters**

The Council will carry out a financial check on the Applicant. This will take the form of a review of the Applicant’s accounts available from Companies House. If company accounts are not available then the Council will carry out a financial check on the information available. This professional judgement will be provided from the Council’s finance team.

Any additional information provided should be clearly referenced to the question number in your submission.

**4.3 Selection Questionnaire**

|  |
| --- |
| **Part 1: Potential supplier information**NOTE TO APPLICANT: Part 1 must be completed but will not be scored |
| **Section 1.1** | **Potential supplier information** |  |
| **Question number** | **Question** | **Response** |
| 1.1(a) | Full name of the potential suppliersubmitting the information |  |
| 1.1(b) – (i) | Registered office address (if applicable) |  |
| 1.1(b) – (ii) | Registered website address (if applicable) |  |
| 1.1(c) | Please mark ‘X’ in the relevant box to indicate your trading status | 1. a public limited company
 |  |
| 1. a limited company
 |  |
| 1. a limited liability partnership
 |  |
| 1. other partnership
 |  |
| 1. sole trader
 |  |
| 1. other (please specify)
 |  |
| 1.1(d) | Date of registration in country of origin |  |
| 1.1(e) | Company registration number (if applicable) |  |
| 1.1(f) | Charity registration number (if applicable) |  |
| 1.1(h) | Registered VAT number |  |
| 1.1(k) | Trading name(s) that will be used if successful in this procurement |  |
| 1.1(l) | Please mark ‘X’ in the relevant box to indicate whether any of the following classifications apply to you | 1. Voluntary, Community and Social Enterprise (VCSE)
 |  |
| 1. Small or Medium Enterprise (SME)
 |  |
| 1. Sheltered workshop
 |  |
| 1. Public service mutual
 |  |
| **Please provide the following information about your approach to this procurement.** |
| **Section 1.2** | **Bidding model** |  |
| **Question number** | **Question** | **Response** |
| 1.2(a) - (i) | Are you bidding as the lead contact for a group of economic operators?If yes, please provide details listed in questions below. | **Please indicate your answer by marking ‘X’ in the relevant box.** |
| **Yes** | **No** |
|  |  |
| 1.2(a) - (ii) | Name of group of economic operators (if applicable) |  |
| 1.2(a) - (iii) | Proposed legal structure if the group of economic operators intends to form a named single legal entity prior to signing a contract, if awarded. If you do not propose to form a single legal entity, please explain the legal structure. |  |
| 1.2(b) - (i) | Are you or, if applicable, the group of economic operators proposing to use sub-contractors?If yes, please provide details listed in questions below. | **Yes** | **No** |
|  |  |
| Name of sub-contractors (if applicable) |  |
| The role each sub-contractor will take in providing the works and /or supplies e.g. key deliverables: |  |
| The approximate % of contractual obligations assigned to each sub-contractor: |  |
| **Contact details and declaration** |
| I declare that to the best of my knowledge the answers submitted and information contained in this document are correct and accurate.I declare that, upon request and without delay I will provide the certificates or documentary evidence referred to in this document.I understand that the information will be used in the selection process to assess my organisation’s suitability to be invited to participate further in this procurement.I understand that the authority may reject this submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section.I am aware of the consequences of serious misrepresentation. |
| **Section 1.3** | **Contact details and declaration** |  |
| **Question number** | **Question** | **Response** |
| 1.3(a) | Contact name |  |
| 1.3(b) | Name of organisation |  |
| 1.3(c) | Role in organisation |  |
| 1.3(d) | Phone number |  |
| 1.3(e) | E-mail address |  |
| 1.3(f) | Postal address |  |
| 1.3(g) | Signature (electronic is acceptable) |  |
| 1.3(h) | Date |   |
| **Part 2: Exclusion grounds**NOTE TO APPLICANT: this section must be completed and will be evaluated as a whole on a Pass or Fail basis. The section will be marked as a ‘Fail’ if “Yes” is answered to question 2.1(a) and 2.2(a) and satisfactory evidence of self-cleaning is not detailed in your response to question 2.1(b) and 2.2(b). |
| **Section 2.1** | **Grounds for mandatory exclusion** |  |
| **Question number** | **Question** | **Response** |
| 2.1(a) | **Regulations 57(1) and (2)**The detailed grounds for mandatory exclusion of an organisation are set out on this [web page](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf), which should be referred to before completing these questions.Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences within the summary below and listed on the [webpage](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf). |
|  | **Please indicate your answer by marking ‘X’ in the relevant box.** |
| **Yes** | **No** |
| Participation in a criminal organisation |  |  |
| Corruption |  |  |
| Fraud |  |  |
| Terrorist offences or offences linked to terrorist activities |  |  |
| Money laundering or terrorist financing |  |  |
| Child labour and other forms of trafficking in human beings |  |  |
| 2.1(b) | If you have answered yes to question 2.1(a), please provide further details.Date of conviction, specify which of the grounds listed the conviction was for, and the reasons for conviction,Identity of who has been convictedIf the relevant documentation is available electronically please provide the web address, issuing authority, precise reference of the documents. |  |
| **Section 2.2** | **Grounds for discretionary exclusion** |  |
| **Question number** | **Question** | **Response** |
| 2.2(a) | **Regulation 57 (8)**The detailed grounds for discretionary exclusion of an organisation are set out on this [web page](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf), which should be referred to before completing these questions.Please indicate if, within the past three years, anywhere in the world any of the following situations have applied to you, your organisation or any other person who has powers of representation, decision or control in the organisation. |
|  | **Please indicate your answer by marking ‘X’ in the relevant box.** |
| **Yes** | **No** |
| Breach of social obligations?  |  |  |
| Breach of labour law obligations? |  |  |
| 2.2(b) | If you have answered Yes to question 2.2(a), explain what measures have been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self Cleaning) |  |
| **Part 3: Selection questions** |
| **Section 3.1** | **Economic and financial standing** |  |
| **Question number** | **Question** | **Response** |
| 3.1 |  | **Please indicate your answer by marking ‘X’ in the relevant box.** |
| **Yes** | **No** |
| Are you able to provide a copy of your audited accounts for the last two years, if requested?If no, can you provide **one** of the following: |  |  |
| (a) A statement of the turnover, Profit and loss Account/income Statement, Balance Sheet/Statement of Financial Position and Statement of Cash Flow for the most recent year of trading for this organisation. |  |  |
| (b) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position. |  |  |
| (c) Alternative means of demonstrating financial status if any of the above are not available (e.g. forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status). |  |  |
| **Section 4** | **Technical and professional ability** |  |
| 4.1 | Please provide details of up to three contracts, in any combination from either the public or private sector; voluntary, charity or social enterprise (VCSE) that are relevant to our requirement. VCSEs may include samples of grant-funded work. Contracts for supplies or services should have been performed during the past three years. Works contracts may be from the past five years.Consortia bids should provide relevant examples of where the consortium has delivered similar requirements. If this is not possible (e.g. the consortium is newly formed or a Special Purpose Vehicle is to be created for this contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or Special Purpose Vehicle (three examples are not required from each member).If you cannot provide examples see question 4.2 |
|  | Contract 1 | Contract 2 | Contract 3 |
| Name of customer organisation |  |  |  |
| Point of contact in the organisation |  |  |  |
| Position in the organisation |  |  |  |
| E-mail address |  |  |  |
| Contract Start date |  |  |  |
| Contract completion date |  |  |  |
| Estimated contract value |  |  |  |
| Description of contract 1: |
| Description of contract 2: |
| Description of contract 3: |
| 4.2  | If you cannot provide at least one example for questions 6.1, in no more than 500 words please provide an explanation for this e.g. your organisation is a new start-up or you have provided services in the past but not under a contract. |
| Response: |
| **Section 5** | **Additional questions** |  |
| **5.1** | **Insurance** |  |
| Please self-certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated below(Please indicate your answer by marking ‘X’ in the relevant box): | **Yes** | **No** |
| Employer’s (Compulsory) Liability Insurance = £5m |  |  |
| Public Liability Insurance = £5m |  |  |
| Product Liability Insurance = £5m |  |  |
| Professional Indemnity Insurance = £1m |  |  |
| \* It is a legal requirement that all companies hold Employer’s (Compulsory) Liability Insurance of £5 million as a minimum. Please note this requirement is not applicable to Sole Traders. |  |  |

**Section 5 The Specification**

Introduction

Exeter City Council is proposing to enter into a 3 year contract for a professional firm to provide the required Right to Buy Housing Valuations.

Background

Exeter City Council has approximately 5,000 properties within its Social Housing Portfolio. When a Tenant applies for the right to buy their own home, the Council as Landlord, is required to carry out a valuation within a set time table.

Quantity

There have been approximately 30 RTB applications over the last 6 month period. The Council cannot guarantee the quantity of valuations that will be required nor that each and every valuation will be allocated on this contract.

Requirements of the Valuer:

The Valuer carrying out these valuations must meet the following criteria

The Valuer must either be a member the National Association of Estate Agents or the Royal Institution of Chartered Surveyors. Please provide evidence of this with your RFQ submission.

The Valuer must confirm that they are DBS checked by as they may be visiting homes with children and or vulnerable adults.

Provide details of the Valuer’s knowledge of the Exeter property market.

Provide evidence of any previous experience in undertaking Right to Buy Valuations.

Confirm their ability to produce reports within 10 working days of instruction or sooner in occasional circumstances.

**Reporting methodology**

|  |
| --- |
| **Instructions for Valuations** |
|  |
| Instructions will be e-mailed by a member of Exeter City Council, Corporate Property (the instructing officer) The valuation should be completed on the accompanying forms and e-mailed as a PDF to the instructing officer. |
|  |
| **Plans** |
| All plans are prepared on the understanding that when all properties in an area are sold the Council will not be left with any residual responsibilities. Every individual sale must follow this principle. |
| Houses |
|  |
| A plan will be provided by the instructing officer showing edged red what are believed to be the boundaries and boundary responsibilities by “T” or “P” marks. These must be checked on site and either confirmed as correct or any material differential discrepancy included in the report.Particular care must be taken where gardens are open and communal in nature and/or where pathways or passageways are shared. Apportioned share of maintenance must also be included. You must identify this by colour on the plan. The colour scheme is blue where a right is reserved or brown where a right is granted. |
|  |
| Flats |
|  |
| A plan will be provided by the instructing officer showing the block of flats. It will be your responsibility by enquiries on site and with Corporate Property to determine the extent of all gardens used by occupiers of that block are correctly indicated by blue boundary on the plan. The block to be shaded pink and any footpaths yellow. |
|  |
| Generally |
|  |
| Identify “open plan” front gardens and any flying freeholds. Open plan front gardens to be hatched black on the plan.If flying freeholds are identified it will be necessary to inform the instructing officer so that ground and 1st floor plans can be prepared. |
|  |
| **Improvements** |
|  |
| Assume the property is in a reasonable state of decoration and repair as the tenants are obliged to keep it that way.A note of improvements made by the tenant will be provided by the Council. These improvements are to be verified on site, amended as necessary with any additional authorised improvements discovered on inspection and taken into consideration in the valuation, if necessary, after appropriate consultation with the instructing officer. |
|  |
| **Inspect** |
|  |
| Inspect the property as soon as possible by appointment with the tenant. Identify structural defects, if any, affecting the dwelling, the building in which it is situated or any other building over which the tenant will have rights under the conveyance or lease. Consider any visual evidence relating to the admissibility or otherwise of the tenant’s application and report any discrepancies to the instructing officer, e.g. if it appears the person in occupation is sub-letting. The person who made the RTB application should be occupying it as their principal home. You are not expected to lift carpets, move furniture or go into loft spaces. |
|  |
| **Tenant Liaison** |
|  |
| If tenants have any questions on the RTB process you should suggest that they contact the right to buy administrator directly. |
|  |
| **Planning** |
|  |
| Identify opportunities for development of overlarge plots and consult Corporate Property where necessary, and take into account in the valuation. |
|  |
| **Valuations**Valuation basis is Vacant Possession assuming a willing vendor, a willing purchaser and a reasonable period to market the property. |
|  |
| 1. Prepare valuation and submit valuation report via email to instructing officer, within 10 working days, or sooner in occasional circumstances
2. In the case of flats, prepare two insurance valuations for the dwelling concerned, one on a full re-build basis and the other on a shell only basis excluding all fixtures and fittings but including windows and an allowance for common parts. Further, to advise the instructing officer of gross external floor area. The second valuation assumes the leaseholder fits out the interior.
 |
|  |
| **Garages** |
| A garage in a separate block is usually not included in the RTB, a garage within the garden or an integral part of the property is included. The defining fact is whether the rent is inclusive (in which case it is included) or whether there is a separate agreement and rent. If in doubt it should be brought to the Council’s attention and the valuation should cover either scenario. |
|  |
| **Determinations** |
|  |
| Any appeal to the District Valuer for a determination of a valuation will be notified by the instructing officer. You will receive instructions to assist in providing fully supported representations with comparables to the Council to justify the valuation. These will be sent by Corporate Property to the District Valuer to be taken into consideration in their determination. |

**A template valuation report and inspection sheet (6 page) can be found in Appendix C to these documents.**

**Section 6 The Pricing Document**

All prices shall be stated in pounds sterling and exclusive of VAT.

|  |  |
| --- | --- |
|  | **£** |
| **Total price for the carrying out of a Right to Buy Valuation (as detailed in these documents):** |  |

**Section 7 The Quality Assessment**

Not Applicable to this RFQ

**PART C - SCHEDULES**

**Schedule 1 - Form of Quotation and Declarations**

**Request for Quotation Which Does Not Include a Formal Deed of Agreement**

Having examined the Request for Quotation and its accompanying documents (which I/we shall keep) and being satisfied as to my/our abilities and experience in all respects to satisfy the requirements of the Contract.

Offer to provide or supply upon the terms and conditions of the contract contained in Appendix A in its present form the Services for the prices on the quoted Pricing Document as indicated below for the contract period :-

|  |  |
| --- | --- |
| Pricing Document attached  | YES / NO |

and/or during the contract period at the price ascertained under the terms and conditions of contract.

I/We understand and agree that your written letter of acceptance of our Quote shall constitute the making of a binding contract between us.

I/We understand that the information provided in this quotation document and any supporting information provided by us will be relied upon and taken to be true and accurate. If it is subsequently determined that any information supplied was inaccurate, I/we understand and accept that Council reserves the right to exclude our offer to supply (if still under evaluation) or if the Contract has been awarded and the information inaccurately supplied had a significant bearing on the award, that Council shall be at liberty to terminate the Contract.

I/We understand that you are not bound to accept the lowest or any Quote you may receive.

Signed……………………………………………………………………………..

Date ……………………………………………………………………………….

in the capacity of ……………………………………………………………….

duly authorised to sign for and on behalf of

(in BLOCK CAPITALS) ………………………………………………………….

Telephone No. ……………………………………………………………………

Postal Address ……………………………………………………………………

**PART D – APPENDICES**

**Appendix A - Terms and Conditions of Contract for Services**

**See attached Appendix A:**

**Exeter CITY COUNCIL TERMS AND CONDITIONS FOR THE PERFORMANCE OF SERVICES UNDER £75,000.00**

To be completed on formal signing of award of contract.

**Appendix B - Defined Terms**

|  |
| --- |
| **For the purpose of this Quotation the following words and expressions shall have the meanings set out below.** |
| **Appendix** | The referred Appendix attached to, or supplied with, this RFQ. |
| **Applicant** | Any person or persons, firm or firms, company or companies bidding for the Services, Supplies or Works detailed in this RFQ, or, where there is more than one organisation applying, the lead organisation. |
| **Authorised Officer** | The person(s) detailed in 1.1 of this RFQ. |
| **Award Criteria** | The evaluation criteria that will be applied to all bids satisfying the Selection Criteria (if applicable). |
| **Contract** | The Contract for the provision of the Services, Supplies or Works, which will be awarded to the successful Applicant. |
| **Council** | Exeter City CouncilCivic CentreParis StreetExeterEX1 1JW |
| **Lead Organisation** | In the case of a consortium Applicant or an Applicant relying on Significant Subcontractors, the organisation responsible for leading the submission. |
| **Quality Assessment/Evaluation** | The quality element of an Applicant’s bid and/or the evaluation relating to that quality aspect. |
| **Quotation/Quote** | Shall mean the Applicant’s offer to the Authority, which shall be submitted as the completed procurement documents |
| **Relevant Organisation** | (a) where the Applicant is a consortium, each consortium member other than the Lead Organisation; and(b) where the Applicant or consortium member is a prime contractor, each Significant Subcontractor other than the Lead Organisation. |
| **Request for Quotation (RFQ)** | This Request for Quotation documentation for Right to Buy Housing Valuations for Exeter City Council 2018.  |
| **Selection Criteria** | The criteria used to select those Applicants whose bids will be considered for evaluation against the Award Criteria. |
| **Significant Subcontractor** | Where there is a subcontracting arrangement, each proposed subcontractor where that proposed subcontractor will be contributing significantly, either in terms of value or importance to the performance of the Works. |
| **Services** | The Service or Services as described in this RFQ.  |

**Appendix C - Template Valuation Report and Inspection Sheet.**

**(See attached Appendix C)**