



Ealing Council Tender 1115

Part C Specification of Services

For

**Sales Agent for Marketing Properties
at Golf Links, Lovell Road & Windmill
Lane in the Southall area**

For

London Borough Ealing

Sales Agent Brief: Golf Links Estate, Lovell Road & Windmill Lane in the Southall area (ref 1115) London Borough of Ealing

1.0 Background

Ealing Council has a substantial new build programme and by the summer of this year will have developed a number of homes for sale on the Golf Links estate Southall. The Council has also entered into contract to build a further nine homes for sale at Lovell Road, and the same number at Windmill Lane. On Golf Links there are 5 X 3 bed houses and 4 flats which have been earmarked for either Shared Ownership or Equity Share, and being near completion need to be sold by the autumn of 2015

The Council is looking to appoint an experienced sales agent to market and sell these properties and to prepare a list of suitable purchasers, carry out the necessary financial checks and ensure the conveyance process is satisfactorily completed (see detailed specification of services below)

The three schemes form part of a larger programme. The Council is developing a much larger sales scheme as part of the Copley Estate regeneration in the next 18 months, and further individual schemes will also be let

Details of Golf Links, Lovell Road, and Windmill Lane projects are appended to this document

2.0 Criteria for assessing the appointment of Sales Agent

General

The sales agent will be expected to demonstrate a detailed understanding of the sales market in Ealing, and experience of working with a housing provider (Registered Provider; local authority or developer) to deliver shared ownership/ equity share sales schemes

In particular knowledge and experience in terms of:

Financial Regulations

1. demonstrating an understanding of the financial regulations and requirements governing the sale of shared ownership/ equity share sales laid down by bodies such as the FSA and the GLA/HCA
2. ability to screen applicants using an approved regulated financial advisor to conduct a full assessment using agreed HCA calculators
3. being aware of changes to guidance and relay them to the Council, and applicants
4. an ability to independently produce guidance that assists prospective purchasers in terms of an “affordability” model, which could include advice to the Council on initial rent and service level setting

Marketing

5. recommend an appropriate fee for marketing
6. produce a strategy for marketing the homes through suitable branding on site and through advertising through the agent's local offices (if applicable)
7. advise and implement an advertising campaign through newspapers, mail shots, the agent's own and other recognised web-sites providing relevant information about the scheme and the surrounding areas. Scheme information to include electronic brochures; floor and site plans and specifications
8. provide advice on the provision of a show home or other form of scheme marketing

Conveyance Process

9. while it is envisaged that the conveyance process will be undertaken by others, the sales agent will be expected to take a lead and ensure that the required plans are provided, essential scheme information completed, and correct legal documentation is ready on a timely basis. This will be achieved by the Council given authority to the sale's agent to call on this information by the chairing regular meetings with the site and project staff, Council's Sales Advisor and legal team
10. in addition to chasing legal representatives, regular contact with mortgage brokers will be required in order to ensure that offers to purchasers are provided promptly
11. the sales agent is invited to offer any added value added services to assist the conveyance process e.g. offer of a standard lease that complies with funding and legal requirements, or a legal service that the Council could consider offers good value for money

Reporting and Monitoring

12. provide a dedicated sales manager to hold regular sales review meetings, initially on a fortnightly basis to manage and monitor the programme presenting
 - weekly sales summary
 - weekly sales progression
 - weekly visitors and feedback
13. have a dedicated database which provides and up to date record of leads, potential customers and show response and callback times to inquiries
14. maintain a record of site visits and outcomes in terms of conversion to potential and actual sales
15. offer strategic advice in terms of setting and achieving KPIs; target groups; general sales advice; advice on the fit-out of units

Price setting and Valuation

16. ability to offer RICS qualified valuation advice in the setting of sales values

17. ability to offer the following information on price setting to the Council for each plot for a) release asking price b) “net” release price c) base price information and how would it undertake this
18. advice to clients in the choice of valuers who are “tried and tested” and can work to tight timescales as required by the conveyancing process

Resource commitment

19. provide information to the Council on how this project will be resourced, and the staff structure and reporting lines, and the points of contact

3.0 Project Duration

The successful agent will be appointed on 1st July and sales on Golf Links would be expected to be completed before the end of the calendar year. The project as a whole is expected to run for two years or longer by mutual agreement

4.0 Fee Level

Please complete the Form of Tender (Part B) and set out your offer as a fixed sum based on a percentage of the sales receipts. Price forms 30% of the section criteria

5.0 Inclusions/Exclusions

Complete the list as set out in The Form of Tender as follows

1. Does the price include full marketing costs (advertising, mail shots, use of websites, electronic brochures)? Yes/No
2. Does this cost include floor plans, CGIs, conveyancing plans
3. Is the cost of setting up and furnishing a show home included? Yes/No
4. Does the offer include RICS sales valuation (and re-valuations)? Yes/No
5. Any other exclusions – please list

For the avoidance of doubt it is assumed that EPCs, NHBC approvals will be provided by others, and any other “added value” items are not included in the offer price

Items of Added Value should be referred to in the Written Submission (Qualitative Questionnaire) Part D

6.0 Written Submission (Qualitative Questionnaire) Part D

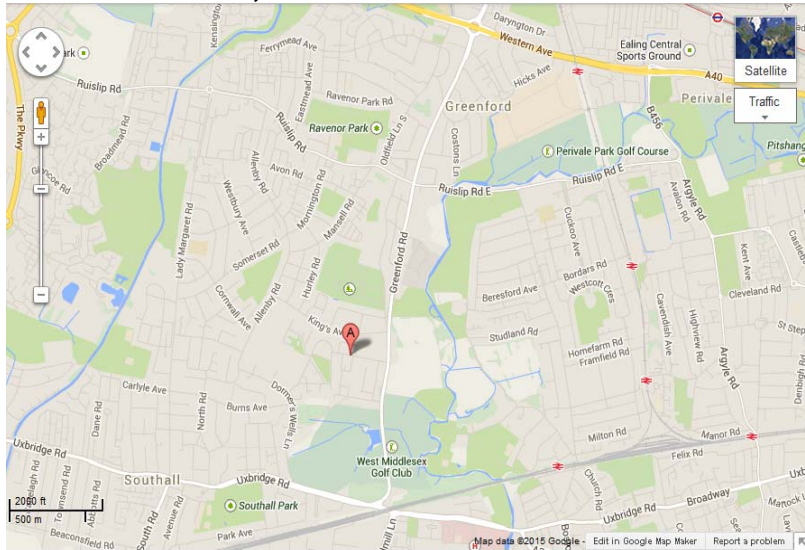
Please complete this section which is worth 70% of the selection criteria (see Part D and Part A setting out how marks will be awarded)

7.0 Return of Tenders

Tenders must be returned by **12 noon 9th June** to the address set out in Part A, and using the Tender Return Label

Appendix 1 Details of the three current projects

Golf Links Estate, Southall UB1 3NN



Key information:

- Comprehensive works are taking place on the estate: a mixture of new build and refurbishment. This will improve the aesthetics of the estate in general and is expected to have a positive impact on the sales values.
- The estate is well served by public transport
- It will be a mixed tenure scheme
- The proposed homes for sale are located in a new £10million redevelopment and comprise five 3 bed terraced new build houses with car parking within the curtilage, and two 2 bed flats and two 1 bed flats on the top floor of a new build block which will overlook a new parkland walk
- Practical completion is due by August 2015

Lovell Road, Southall UB1 3LD Ref: PP/2014/4595 Planning consent: 0/12/2014

Key Information

- Purpose build block of 9 flats off Lovell Road, contract let April 2015 with a completion date of October 2016, Code Level 4 compliant
- Mix of 8 x 2 bed apartments and 1 x 1 bed
- Scheme to let May 2015 with completion November 2016

Windmill Lane, Greenford UB6 9DZ Ref PP/2014/4282 Planning consent granted:3/12/2014

Key information

- Windmill Lane is an attractive residential street
- Comprises a block of 6 shared ownership flats comprising 4 x 2 bed and 2 x 1 bed apartments, with private off street parking
- 3 x 3 bed houses for outright sale on Windmill Lane.
- Both affordable and private sale Code 4 compliant

- Scheme to be let May 2015 with practical completion, early summer of 2016

Plans of the projects can be assessed from the following Drop Box

<https://www.dropbox.com/sh/nxhkizlpdlqapiv/AACYT1M9LudhNXHyugKza3Wma?dl=0>