

# **INVITATION TO TENDER**

## **SPECIFICATION**

For the provision of a Contract to supply

Footfall Data in Town Centre Retail Locations  
in England & Wales to the Valuation Office Agency

**VOA/2018/023**

## 1. INTRODUCTION

1.1. The Valuation Office Agency (VOA) is an executive agency of HMRC with circa 3,600 staff. Our main functions are to compile and maintain the business rating and council tax valuation lists for England and Wales, value property in England, Wales and Scotland for the purposes of taxes administered by HMRC, provide statutory and non-statutory property valuation services in England, Wales and Scotland, determine Local Housing Allowance levels and register fair rents in England.

1.2. The Valuation Office Agency's rating and council tax valuations provide the base valuation data for the collection of around 53.6 billion of local taxation a year.

1.3. The work of the VOA encompasses:

- compiling and maintaining lists of rateable values of the 2.06 million non-domestic properties in England, and the 112,000 in Wales, to support the collection of around 27 billion<sup>1</sup> in business rates;
- compiling and maintaining the lists of [council tax](#) bandings of some 25 million domestic properties in England and 1.4 million in Wales, to support the collection of around 26.6 billion<sup>2</sup> in council tax;
- determining [local housing allowances](#) across some 150 Broad Rental Market areas for housing benefit purposes and registering some 60,000 Rent Act 1977 [fair rents](#) in England;
- delivering a range of statutory and non-statutory valuation and surveying [services](#) to central and local government departments and the wider public sector; and
- providing valuation advice to HMRC in connection with capital gains, inheritance tax and other tax compliance work.

1.4. Please see [www.voa.gov.uk](http://www.voa.gov.uk) for further details.

## 2. BACKGROUND

2.1. The footfall and retail vacancy rates in a particular town centre are traditionally regarded as a measure of the economic health of the location and a contributory factor in the levels of rents paid for retail units in the location. Any changes in footfall or vacancy rates can have a knock on effect to rental values.

2.2. It is generally acknowledged that footfall is a strong indicator of a location's trading performance, and this has been corroborated by the private sector identifying that town centres, with higher footfall volumes, generate a greater level of spend.

2.3. This often translates into the levels of rents that are paid for retail outlets, and aids in comparison between streets in a town/city centre, within streets and between town centres.

2.4. As the Rateable Values determined by the VOA have a direct relationship with the rental value of premises, as at a defined date, it follows that footfall can have a direct comparative relationship between Rateable Values.

2.5. It is proposed that the VOA acquire suitable footfall data to assist in the preparation of Rateable Values for the 2021 Rating Lists.

2.6. The contract will run until April 2021 with an option to extend by 12 months.

### **3. REQUIREMENT**

3.1 The dataset that the VOA requires is as follows:

3.1.1 The data should separately cover and identify 100+ town / city centres in England and Wales. For city centres and larger town centres it should be broken down to separately provide data for identified main shopping streets. It would be an advantage if "landmark" shopping streets, such as Oxford Street in London were further broken down into defined geographical sectors.

3.1.2 Initially the data should cover the period from 1st April 2018 to 1st April 2021 and be supplied on an ongoing quarterly basis from the beginning of the contract, with the historic data supplied at the beginning of the contract.

3.1.3 For each centre/street it must provide:

- Weekly average footfall by month;
- Data to be provided as volumes and year-on-year percentage change;
- Data to be provided in Excel spreadsheet format;
- There needs to be no restriction against the VOA downloading the data provided, storing it on our own systems and quoting the data at a later date.

3.1.4 Each quarterly Footfall report must:

- Detail approach and methodology adopted;
- Detail any variances in both approach and methodology;
- Summary of key findings;
- Main Body of report - Weekly average footfall by month;
- Conclusions;
- Report signed off by Author.

### **4. MANAGEMENT INFORMATION**

4.1. The nature of contract management reviews and management information will be agreed between the VOA Contract Manager and Supplier Contract Manager post-contract award. Reviews will be scheduled as a minimum on a quarterly basis.

### **5. VOA CONTRACT MANAGER DETAILS**

5.1. The successful supplier will be required to appoint a contract manager who will act as the principal point of contact for VOA.

5.2. The VOA will appoint a contract manager who will act as the principal point of contact for the supplier.

## 6. PAYMENT TERMS

6.1. Payments will be made via an electronic payments system, ERP. Invoices should be provided for each milestone within one month of agreement of deliverables and sent to VOA Accounts Payable (accounts.payable@voa.gsi.gov.uk) copying in [voainvoices.ap@hmrc.gsi.gov.uk](mailto:voainvoices.ap@hmrc.gsi.gov.uk) (including the purchase order provided). Payments will be made into the bank account provided by the Supplier.

## 7. TIMETABLE

The estimates timetable for delivery is set out below

DATE	ACTIVITY
1 <sup>st</sup> November 2018	Publication of ITT
1 <sup>st</sup> November 2018	Clarification period starts
3 pm 8 <sup>th</sup> November 2018	Clarification period closes (" <b>Tender Clarifications Deadline</b> ")
9 <sup>th</sup> November 2018	Deadline for the publication of responses to Tender Clarification questions
3pm 15 <sup>th</sup> November 2018	Deadline for submission of Tenders to the Agent (" <b>Tender Submission Deadline</b> ")
16 <sup>th</sup> November 2018	Bids Compliance Checks
19 <sup>th</sup> November 2018	Commencement of Evaluation Process
29 <sup>th</sup> November 2018	Proposed Award Date of Contract
3 <sup>rd</sup> December 2018	Expected commencement date for Contract

### Length of Contract

The contract term will be from December 2018 until to April 2021.

An extension of a further 12 months by mutual agreement may be negotiated to accommodate this requirement.

## 8. TERMS AND CONDITIONS



VOA Short Form  
Ts&Cs\_2018.doc

## 9. TENDER REQUIREMENTS

### 9.1. Quality Criteria (this will form 80% of the evaluation)

- 9.1.1. Please demonstrate the ability to supply data that separately covers and identifies 100+ town / city centres in England and Wales. (20%)
- 9.1.2. Please demonstrate whether your data break down for city centres and larger town centres to separately provide data for identified main shopping streets. (20%)
- 9.1.3. It would be an advantage if "landmark" shopping streets, such as Oxford Street in London were further broken down into defined geographical sectors (5%)
- 9.1.4. With reference to the Specification, please demonstrate the delivery of data that covers the period from 1st April 2018 to 1st April 2021 and be supplied on an ongoing quarterly basis from the beginning of the contract (10%)
- 9.1.5. Will the historic data be supplied at the beginning of the contract? (10%)
- 9.1.6. With reference to the Specification, please confirm that for each centre/ street the data will provide:
  - 9.1.6.1. Weekly average footfall by month; (10%)
  - 9.1.6.2. Data to be provided as volumes and year-on-year percentage change; (10%)
  - 9.1.6.3. Data to be provided in MS Excel spreadsheet format; (5%)
  - 9.1.6.4. There needs to be no restriction against the VOA downloading the data provided, storing it on our own systems and quoting the data at a later date. (10%)

## **9.2. Pricing (This will form 20% of the evaluation)**

- 9.2.1. Please submit a firm and final price to meet the full specification.  
Prices should be submitted in pounds Sterling inclusive of any expenses, but exclusive of VAT

## **9.3. Scoring**

- 9.3.1. Scoring will be kept within bands and scores allocated for each question in line with scoring scheme contained in the following table.  
The maximum total score will be 100. Please See Appendix A.

9.3.2. Please note that Travel undertaken must comply with VOA Travel Policies and reimbursements will only be made in accordance with Travel rates and approvals.

## **10. Specification Queries**

10.1.1. Tenderers with any queries should contact [tenders@voa.gsi.gov.uk](mailto:tenders@voa.gsi.gov.uk) by email before **3pm 8<sup>th</sup> November 2018**.

## **11. Tender Submission**

11.1.1. You should send a PDF or read-only electronic copy of your proposal by e-mail to [tenders@voa.gsi.gov.uk](mailto:tenders@voa.gsi.gov.uk), as an attachment to an e-mail message entitled "**Footfall Data**". Tender to arrive **no later than 3pm 15<sup>th</sup> November 2018** (unless the date is subsequently amended in writing by the VOA)

11.1.2. Please note that email messages with this title sent to [tenders@voa.gsi.gov.uk](mailto:tenders@voa.gsi.gov.uk) will not be opened in advance of that deadline. No hard copies of the tender are required.

## Appendix A – Evaluation Criteria

Score	'Closed' Question Criteria	'Open' Question Criteria
100	Excellent answer which meets all of the requirements and provides all of the required detail.	<p>Exceptional demonstration by the supplier of the relevant ability, understanding, experience, skills, resources and quality measures required.</p> <p>The response is excellent and completely relevant.</p> <p>The response is comprehensive, unambiguous and demonstrates an excellent understanding of, and meets, the requirements in all aspects, with no clarification required.</p> <p>The response is well thought out and/or provides</p> <ul style="list-style-type: none"> <li>• highly credible examples;</li> <li>• benefits; or</li> <li>• innovation.</li> </ul>
80	Good answer which meets all of the requirements but lacks some minor detail	<p>Sufficient evidence provided of the appropriate knowledge, skills and experience.</p> <p>The response is good and highly relevant. The response indicates a good understanding of the requirements and provides sufficient detail across all areas. The response demonstrates how the requirements will be met in the main, which may require minor clarification only.</p>
60	Satisfactory answer, which meets the requirements in many aspects, but fails to provide sufficient detail in some areas.	<p>The response is satisfactory and relevant.</p> <p>Reasonable evidence provided of the appropriate knowledge, skills and experience.</p> <p>The response indicates a satisfactory understanding of the requirements in most aspects, although may lack detail in certain areas.</p> <p>The response suggests that the outline requirements would be met satisfactorily but some clarification may be required.</p>
40	Limited answer which satisfies some aspects of the requirements, but fails to meet the specification in the whole.	<p>The response is limited and only partially relevant.</p> <p>The response indicates partial understanding of the requirement.</p> <p>Some evidence provided of the appropriate knowledge, skills and experience.</p> <p>Meets the requirements in some areas but with important omissions.</p> <p>The response contains ambiguities or deficiencies, which suggests that the requirements could be met, but clarification would be required.</p>
20	Poor answer which significantly fails to meet	<p>The response is poor and only partially relevant.</p> <p>Very little evidence of appropriate capability,</p>

Score	'Closed' Question Criteria	'Open' Question Criteria
	the requirements.	<p>experience or expertise.</p> <p>The response addresses some aspects of the requirements but contains insufficient/limited detail or explanation.</p> <p>The response demonstrates only limited understanding of the requirement.</p> <p>The response contains ambiguities or deficiencies which suggest the requirements would not be met.</p>
0	<p>The response is not considered relevant. The response is unconvincing, flawed or otherwise unacceptable.</p> <p>Response fails to demonstrate an understanding of the requirement.</p> <p>No evidence is provided to support the response.</p> <p>No response</p>	