

Invitation to Tender

Strategic Housing Market Assessment



Invitation to Tender

for

Strategic Housing Market Assessment

{Insert Company name here}

Invitation to Tender
Strategic Housing Market Assessment

CONTENTS

SECTION A – INSTRUCTIONS & INFORMATION	3
A1 DEFINITIONS.....	3
A2 DEFINITIONS SPECIFIC TO THIS PROCUREMENT	6
A3 THE PROCUREMENT OPPORTUNITY	7
A4 UNDERSTANDING THE PROCUREMENT PROCESS	11
A5 UNDERSTANDING THE PROCUREMENT DOCUMENTATION	19
SECTION B – SPECIFICATION	23
B1 BACKGROUND.....	23
B2 SIGNIFICANT CHANGES SINCE 2007	23
B3 PROJECT SPECIFICATION	34
SECTION C – SELECTION & AWARD	40
SECTION D – PRICING	43
D1 Pricing Schedule	43
D2 Pricing Schedule Declaration	45
SECTION E – FORMS	47
E1 Submission Checklists and Information to Read and Complete.....	47
E2 Organisation Information	48
E3 Certificates	50
E4 Equalities Monitoring Form.....	53
E5 Supplier Feedback Form	55

Invitation to Tender

Strategic Housing Market Assessment

SECTION A – INSTRUCTIONS & INFORMATION

A1 DEFINITIONS

In this Invitation to tender the following words and expressions shall have the following meanings set out below:

Term	Definition
Applicant	Shall mean the organisation responding to this Invitation to Tender (ITT)
Supplier	means the contractor appointed to provide the Services to the Council
Clarification Period	means the time during which clarifications associated with the ITT or any support documentation may be sought in writing to the Contact Officer
Commencement Date	means the date when the Contract commences as indicated in section 2.9 of this ITT
Contact Officer	means Chanelle Busby (Corporate Procurement Manager) at Mid Devon District Council whose e-mail is cbusby@middevon.gov.uk and Tel: (01884) 234228 [NB. Questions in relation to this contract should be submitted through the Question & Answer (Q&A) Facility on the Supplying The Southwest portal and not direct to the contact or any Officer]
Contract	means the Contract for the provision of the Services, which will be awarded to a successful Tenderer(s).
Contracting Council	Mid Devon District Council is the Contracting Council for the purposes of this tender.
Consortia/Consortium	Shall mean two (2) or more persons, at least one of whom is an economic operator, acting jointly for the purpose of being awarded a public contract (pursuant to Article 28(1) Public Contracts Regulations 2006)
Councils	means Mid Devon, East Devon and Teignbridge district councils, Exeter City Council and Dartmoor National Park Authority
Employers' Liability (Compulsory Insurance)	Shall mean an insurance that enables organisations to meet the costs of damages and legal fees for employees who are injured or made ill at work through the fault of the employer. Employees injured due to an employer's negligence can seek compensation even if the organisation goes into liquidation or receivership. The NHS can also claim the costs of hospital treatment (including ambulance costs) when personal injury compensation is paid. This applies to incidents that occur either on or after 29 January 2007. By law, an employer must have EL insurance and be insured for at least £5 million . Most insurers automatically provide cover of at least £10 million. The insurance must cover all the organisation's employees in England, Scotland, Wales and Northern Ireland. If the organisation is not a limited company, and you are the only employee or you only employ close family members, you do not need compulsory Employers' Liability Insurance. Limited

Invitation to Tender

Strategic Housing Market Assessment

	companies with only one employee, where that employee also owns 50 per cent or more of the issued share capital in the company, are also exempt from compulsory Employers' Liability Insurance. However, there is nothing to prevent an exempt employer from choosing to buy this insurance in view of the financial security it can provide.
Form of Tender	means the form submitted by the Tenderer to the Council as part of the Tender, a draft of which is annexed at Schedule 1
ITT	means this Invitation To Tender
Lead Applicant	Shall mean the organisation leading the bidding process on behalf of its consortia or sub-contractor partners
MDDC	means Mid Devon District Council
MEAT	Shall mean Most Economically Advantageous Tender
Member	Shall mean the elected councillors representing the wards and the business-owners, residents and visitors thereof within the district of Mid Devon
Official Purchase Order	Shall mean the Authority's Official Purchase Order, to which these conditions apply
Pricing Schedule	means the schedule of prices at Section 7 required to be completed by the Tenderer as part of the Tender
Product Liability Insurance	<p>In Product Liability Insurance terms, a product is any physical item that is sold or given away.</p> <p>Products must be 'fit for purpose'. The organisation is legally responsible for any damage or injury that a product it supplies may cause (in some circumstances this also includes products that the organisation does not manufacture).</p> <p>Product Liability Insurance covers the organisation against damages awarded as a result of damage to property or personal injury caused by the product. If damages are paid for personal injury, the NHS can claim to recover the costs of hospital treatment (including ambulance costs). This applies to incidents that occur either on or after 29 January 2007.</p>
Professional Indemnity Insurance	<p>Shall mean a liability cover that provides protection for negligent advice or a service provided by the organisation, it also protects against damages the organisation becomes liable for in relation to mistakes made such as errors of judgement, basic administration errors, mislay of or damage to clients' documents. It is designed to safeguard it against claims made by clients for any resulting financial loss or damage to their reputation. This type of insurance should also cover legal fees and costs.</p> <p>Individuals and organisations that provide professional advice or consultancy services need Professional Indemnity cover.</p>
Public Liability Insurance	<p>Shall mean an insurance that covers members of the public or customers coming to the organisation's premises or if the organisation's staff go to theirs (including if the organisation is based 'at home').</p> <p>It covers any awards of damages given to a member of the public because of an injury or damage to their property caused by the organisation. It also covers any related legal fees, costs and</p>

Invitation to Tender

Strategic Housing Market Assessment

	expenses as well as costs of hospital treatment (including ambulance costs) that the NHS may claim from the organisation. Premiums are based on the type of business and rated on an estimate for the level of activity of the business.
Services	means the provision of a Strategic Housing Market Assessment
Specification	means the Council's requirements in relation to the Services as detailed in Section 5 of this ITT
Submission	<p>Shall mean the correct and proper process for submitting the Applicant's bid electronically. All bids shall be submitted in accordance with the 'Submitting the Tender Response' section of the ProContract Supplier Guide entitled 'The Tender Process within ProContract', which can be found from the 'Help' screen on the system.</p> <p>Applicants will not e-mail their bids directly to any named person/s within the Authority or to any of the Authority's generic e-mail addresses.</p> <p>Applicants will not attach their bids to any part of the ProContract system other than described within the document referred to above.</p> <p>Applicants will not send their bids to the Authority in a paper or other 'hard' format unless specifically requested to do so within the associated bid documentation.</p> <p>Any Submissions that do not accord with the guidelines set out above shall be considered as non-compliant and will be treated as such.</p>
Supplying the South West	Shall mean the e-Tendering portal through which the Authority advertises procurement opportunities and conducts procurement processes electronically
Tender	means the completed and signed Form of Tender, together with all completed schedules and information requested by the Council and submitted by a Tenderer www.supplyingthesouthwest.org.uk
Tender Documents	Shall mean your written offer to Contract Services at the cost/s or rate/s specified in any subsequent documentation
Tenderer	means an applicant who has been invited by the Council to submit a tender

Invitation to Tender

Strategic Housing Market Assessment

A2 DEFINITIONS SPECIFIC TO THIS PROCUREMENT

SHMA	Strategic Housing Market Assessment
NPPF	National Planning Policy Framework
LEP	Local Enterprise Partnership

A3 THE PROCUREMENT OPPORTUNITY

3.1 Introduction

- 3.1.1 This invitation to tender is issued jointly by the Mid Devon, East Devon and Teignbridge district councils, Exeter City Council and Dartmoor National Park Authority (the partner authorities). A Strategic Housing Market Assessment (SHMA) was carried out on behalf of the partner authorities in 2007, covering the Exeter and Torbay Housing Market Areas. The study is now over five years old and was prepared before the full effects of the global recession became apparent. Furthermore, whilst the SHMA identified the local economy as a key driver, it did not fully explore the relationship between housing and economic growth. There has also been population change over the last decade, with an overall 5% rise in population across the two housing market areas between 2001 and 2011, according to Census data.
- 3.1.2 The National Planning Policy Framework (NPPF) requires local planning authorities to ensure that their local plans are based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area.
- 3.1.3 With specific regard to housing, local authorities should have a clear understanding of housing needs and use evidence to ensure that their local plans meet the full, objectively assessed need for market and affordable housing as far as is consistent with the NPPF. Local plans should meet the housing needs and demands of different community groups, identifying the size, type, tenure and range of housing that is required in particular locations. With regard to the economy, local authorities should have a clear understanding of business needs within the economic markets operating in and across their area.
- 3.1.4 Importantly, assessments of and strategies for housing and employment should be integrated and take full account of relevant market and economic signals. Where partner authorities have up-to-date Employment Land Reviews and Housing Needs Assessments in place, the findings of these studies should be integrated within the SHMA.
- 3.1.5 Whilst each local authority has been preparing evidence to support its local plan, the partner authorities have agreed that a new SHMA should be prepared to inform the ongoing and longer-term development of housing, planning and economic policy within the Exeter HMA.
- 3.1.6 Mid Devon District Council will act as the lead authority in commissioning the assessment on behalf of the partner authorities. A steering group of planning and housing officers from each authority will be established to oversee the study, and Devon County Council and the Heart of the South West Local Enterprise Partnership (LEP) will also be involved

Invitation to Tender

Strategic Housing Market Assessment

as key partners. The appointed consultants will be expected to work closely with the steering group throughout the project.

3.2 Background

3.2.1 The SHMA for the Exeter and Torbay Housing Market Areas was published in December 2007. The research was based on the analysis of 3,470 interviews conducted with households (which primarily underwrote the housing needs and requirement modelling). This was coupled with the use of secondary data from the 2001 Census, Housing Corporation, HM Land Registry, Office for National Statistics and a range of other sources, along with a qualitative consultation programme with stakeholders.

3.3 Procurement Timetable

3.3.1 The partner authorities are all at different stages in the preparation of their local plans, as shown in the tables at Section B, paragraph 2.22.

3.3.2 It would be beneficial to have a new SHMA in place as soon as possible, though this needs to be balanced with the need for a robust study that will stand up to scrutiny and provide genuinely useful information to inform housing, economic and planning policy.

3.3.3 An indication of likely key dates is set out below. However, tender submissions should clearly set out a timetable based on the proposed study approach. In particular, consideration must be given to the release of Census data throughout 2013 and if it is considered that the key milestones below cannot realistically be achieved, this should be clearly explained in any tender submission with alternative suggested milestones provided as appropriate.

Invitation to Tender

Strategic Housing Market Assessment

3.3.4 The Authority proposes the following timetable for the award of the Contract(s):

Documents distributed to Applicants	8 th July 2013
Clarification questions to be submitted by	18 th July 2013
Clarification responses to be issued by	23 rd July 2013
Submission deadline	26 th July 2013
Evaluation	w/c 29 th July 2013
Interview (if required)	w/c 5 th August
Standstill period	9 th – 19 th August 2013
Contract Award	20 th August 2013
Progress Report	w/c 4 th November 2013
Draft Report	w/c 2 nd December 2013
Final Report	w/c 3 rd February 2014

3.4 Authority Representative

No person in the Authority's employ or other agent, except as so authorised by the Authority Authorised Officer or Procurement Representative, has any authority to make any representation or explanation to Applicants as to the meaning of the Contract or any other document or as to anything to be done or not to be done by Applicants or the successful Applicant or as to these instructions or as to any other matter or thing so as to bind the Authority.

Authority Authorised Representative contact details:
Peter Williams Forward Planning Team Leader Phoenix House Phoenix Lane Tiverton Devon EX16 6PP
Procurement Representative contact details
Chanelle Busby Procurement Manager Phoenix House Phoenix Lane Tiverton Devon EX16 6PP

Invitation to Tender

Strategic Housing Market Assessment

3.5 Consortia and Sub-contracting

Where an Applicant wishes to make its application as a Consortium or utilising sub-contractors the Authority advises the group of organisations to select a Lead Applicant in whose name the ITT response is to be submitted. The Lead Applicant is advised to confirm precisely what the arrangements are within the ITT including providing the names of all of the organisations to be involved, the nature and extent of their involvement and proposals regarding the structure and management of the Consortium or arrangements. Such details should be provided within Section E Forms and should enable the Authority to assess the overall Consortium or core supply base.

The Lead Applicant should provide details of the actual or proposed percentage shareholding of the constituent members within the Consortium or the exact nature of and degree to which the Services will be sub-contracted.

Applicants that wish to bid as a Consortium or sub-contractor are discouraged from also making their own individual application or from participating in Consortia or providing sub-contracting arrangements for multiple Lead Applicants.

The Authority recognises that arrangements in relation to Consortia and sub-contracting may (within limits) be subject to future change. Applicants should therefore respond to this opportunity in the light of the arrangements as they are currently envisaged. Applicants are informed that any future change in relation to Consortia and sub-contracting must be notified to the Authority during the procurement process or in the event that they are the successful Contractor and in any event as soon as that change is known. The Authority may then make a further evaluation of that Applicant or Contractor by applying the Qualification criteria to the new information provided. In the event that the Authority's evaluation of the new information results in an outcome that is different from the original, the Authority reserves the right to deselect that Applicant from the process on those grounds and the Applicant shall be notified accordingly. As such, the Lead Applicant shall undertake to ensure that any change to its Consortium or sub-contractors shall not have a negative impact upon the arrangements.

If a Consortium is not proposing to form a corporate entity, full details of alternative proposed arrangements should be provided. Where the proposed Lead Applicant is a special purpose vehicle or holding company, information should be provided regarding the extent to which it will call upon the resources and expertise of its members.

Please note that the Authority reserves the right to require a successful Consortium to form a single legal entity in accordance with regulation 28 of the Public Contracts Regulations 2006.

Invitation to Tender

Strategic Housing Market Assessment

A4 UNDERSTANDING THE PROCUREMENT PROCESS

4.1 Procurement Procedure

The Authority is inviting expressions of interest and Tender responses from Applicants. The procurement process that the Authority has selected is a Tender procedure in accordance with the Authority's Contract Procedure Rules and means that all Applicants that submit a Tender shall be evaluated in accordance with the criteria and process outlined at **4.2 Evaluation** and the information contained within it shall be used by the Authority as the means to make a Contract award decision.

4.2 Evaluation

The evaluation process is a critical part of the Tender process and is the means by which the Authority is able to assess to whom the Authority wishes to award the Contract.

The information disclosed by Applicants in its bid will be used in this evaluation process and for evaluation purposes only, except where indicated otherwise.

The Authority's evaluation will be split into two (2) distinct stages as follows:

1. Selection/ Qualification
2. Award

The following criteria and weightings will be applied in the evaluation of the submitted responses:

Evaluation Criteria Breakdown		Sub Criteria % Breakdown	% Criteria Breakdown
Qualification			Pass
Qualification Section One (1)			Pass/ Fail
Qualification Section Two (2): Compliance			Pass/ Fail
Qualification Section Two (2): Experience			Scored
Award: Quality			60%
Method Statement – Quality Assurance		10%	
Method Statement – Technical capacity & expertise		15%	
Method Statement – Understanding and addressing the project specification		35%	
Award: Price			40%

4.3 Qualification

4.3.1 Qualification Process

Qualification is the process by which the Authority is able to assess the suitability of the Applicant to progress on to the next stage of the procurement.

The Authority requires all Applicants to complete the Qualification questions of this procurement process on-line via the Supplying the South West e-Tendering portal. Applicants can find the Qualification questions as part of the 'Response Wizard' (this shows as a button at the bottom

Invitation to Tender

Strategic Housing Market Assessment

of the screen when you click on this opportunity from the 'My Opportunities' window), and is the tool that you will need to use in order to make your Submission electronically. The Qualification questions will appear at Step Two (2) of this 'Response Wizard'.

The Applicant is encouraged to view the questions as soon as they receive this document in order to be able to understand the nature and complexity of the requirements to allow itself sufficient time to respond. Responses can be made at any time prior to the final Submission deadline and can be saved as the Applicant progresses through the process and returned to at any time. However, completion of all questions within this section is mandatory and you will be unable to make a full Submission until all questions are completed fully.

4.3.2 Qualification Section One (1)

The on-line Qualification questions are comprised of ten (10) mandatory questions under the following headings:

1. Grounds for Mandatory Rejection (Regulation 23 of the Public Contracts Regulations 2006 as amended in 2009): which includes questions regarding bribery, corruption and so on;
2. Grounds for Discretionary Rejection (Regulation 23 of the Public Contracts Regulations 2006 as amended in 2009): which includes questions regarding criminal offences, bankruptcy and so on; and
3. Economic and Financial Standing (Regulation 24 of the Public Contracts Regulations 2006 as amended in 2009): which includes questions regarding company turnover, insurances and so on.

The questions within the Qualification questionnaire are standard to all procurement processes that the Authority runs utilising the Supplying The South West e-Tendering portal and passing these questions signifies that the Applicant has met the minimum criteria that the Authority expects of all of its Contractors for any Contract.

Each of the questions within this section shall be scored as Pass/Fail and guidance as to the Authority's minimum requirements in relation to what constitutes a pass or a fail can be found within each question of the questionnaire itself under the heading 'Supplier Help'. An Applicant that fails on one (1) or more of the questions within this Qualification Questions section may be judged to have failed at this Qualification stage of the process in its entirety and may not be evaluated further.

4.3.3 Financial Check

Within Qualification Section Applicants will be asked to give their permission for a financial check by a credit management agency named Equifax. Where Applicants give their permission such a check shall be performed and your financial position determined based on a range of factors including, but not limited to, Directors (number and experience) and parent companies/subsidiaries involved with the organisation, outstanding mortgages or loans, the organisation's profit and loss and balance sheets, the organisation's turnover, profit solvency and cash in the bank figure. The financial check shall yield a score, which will be utilised by the

Invitation to Tender

Strategic Housing Market Assessment

Authority for the purposes of the evaluation of this procurement process, as it determines the following risk factor posed to it by the Applicant:

0 – 19	F
20 – 34	E
35 – 49	D
50 - 64	C
65 – 79	B
80 - 100	A

Financial Check Results

Those Applicants that exceed a score of fifty (50) and for which the recommended contract value is met, shall be judged to have passed this element of the evaluation process. Those Applicants that score less than a score of fifty (50) shall have their financial information referred to the Authority's Corporate Finance department for further investigation. This may comprise the full Equifax generated credit report and any other information as requested by the Authority either during the procurement process or thereafter. The Applicant shall cooperate with the Authority in such instances by responding to any and all requests for further financial information within the deadlines set at the time of request.

Following this, the Authority's Corporate Finance department shall determine the organisation's suitability to progress with the procurement process, taking all of the available facts in to account including the subject matter of the Contract and the risk factors inherent to it. Where the Corporate Finance department rules that an Applicant is suitable to progress with the procurement process the Applicant shall be judged to have passed this element of the evaluation process.

Where the Corporate Finance department rules that an Applicant is not suitable to progress with the procurement process the Applicant shall be judged to have failed this element of the evaluation process. The Authority's Corporate Finance department's professional judgement is final. The Applicant shall, as a result, also be judged to have failed with their Tender application and shall be evaluated no further and notified as such.

Future Financial Checks

Where the procurement process is likely to span across a lengthy period of time or financial years, the Authority reserves the right to undertake a further financial check/s in order to ensure that the organisation's credit rating is suitable. The aforementioned process shall be followed during any subsequent financial checks. The Authority shall notify the Applicant in writing prior to undertaking any further financial checks.

Applicant Fails to Give Permission or no Financial Check is able to be Performed

Where Applicants refuse to give their permission for a check, your organisation shall be judged to have failed this element of the evaluation process. The Applicant shall, as a result, also be judged to have failed with their Tender application and shall be evaluated no further and notified at the Contract award stage of the procurement process as such.

Invitation to Tender

Strategic Housing Market Assessment

Where Applicants give their permission for a check but such a check is unable to be performed because, for example, your organisation does not lodge its final accounts with Companies House, your financial information shall be referred to the Authority's Corporate Finance department who shall determine the organisation's suitability to progress with the procurement in accordance with the aforementioned process.

Applicant's Financial Check Yields Information of Concern to the Authority

In instances where the Authority undertakes a financial check on a particular organisation that yields information that may prove to be of concern, the Authority reserves the right to refer such instances to its Corporate Finance department, regardless of the Applicant's financial check score, whereupon it shall be their responsibility to determine the organisation's suitability to progress with the procurement process.

Where the Corporate Finance department rules that an Applicant is suitable to progress with the procurement process the Applicant shall be judged to have passed this element of the evaluation process.

Where the Corporate Finance department rules that an Applicant is not suitable to progress with the procurement process the Applicant shall be judged to have failed this element of the evaluation process. The Authority's Corporate Finance department's professional judgement is final. The Applicant shall, as a result, also be judged to have failed with their Tender application and shall be evaluated no further and notified as such.

4.3.4 Qualification Section Two (2)

This section will initially determine whether the bid has been submitted in accordance with the checks set out in Table 1 below. This is a Pass/Fail evaluation and the Council reserves the right to eliminate tenders from proceeding to the award stage if the compliance requirements are not met.

Each submission will be assessed against a number of compliance criteria to ensure that the submission is compliant with the Councils' minimum requirements as detailed below:

4.3.5 Table 1: compliance checklist

	YES	NO	COMMENTS
Was the submission received by the given deadline?			
Has the bidder submitted a completed Method Statement and all requested info? (Section C Selection & Award)			
Have all the documents listed under section E been provided?			

Invitation to Tender

Strategic Housing Market Assessment

4.3.6 Experience and Expertise

This will consist of an evaluation of the submission at Section C – Selection & Award C1.1. The submission will be scored using the marking guidelines at Section A 4.4.3 and those four (4) suppliers scoring the highest will be shortlisted and their response to the Award Criteria C2.1 – C2.5 will be evaluated as described at 4.4 below.

The assessment of the Qualification Stage shall be at the absolute discretion of the partner authorities.

4.4 Award

4.4.1 Award Process

Award criteria are those that can be considered in assessing the Most Economically Advantageous Tender and as such Applicants responses to the questions asked should give a clear indication of what the organisation is offering for the price/s quoted in Section D of the Pricing Schedule.

The Authority requires all Applicants to complete all of the Award questions at Section C Award in full and submit in accordance with **5.8 Return of Document**.

4.4.2 Award Questions: Method Statements

The Authority requires the Applicants to submit full Method Statements in accordance with the Method Statement template below and as per the topic headings outlined within Section C Award, which should be completed and returned as part of the Submission. They should be drafted in such a manner so as to be able to form part of the Contract (as applicable) and use defined terms which are consistent with Section A Instructions and Information. They should be submitted containing a sufficient amount of detail so as to demonstrate to the Authority that the stated outcomes as defined within Section B Specification will be deliverable.

Each Method Statement shall be scored individually in accordance with the marking guidelines at 4.4.3 Marking Guidelines and in accordance with the evaluation criteria outlined at 4.2 Evaluation.

Guidance as to the Authority's minimum requirements when it comes to evaluating Applicant's proposals can be found within Section C Award.

The Applicants must note that each and every point detailed within Section B Specification is a requirement of the Service, however, the Authority welcomes enhancements to the Service and Applicants are invited to detail any enhancements within their responses to Section C Award.

Invitation to Tender

Strategic Housing Market Assessment

4.4.3 Marking Guidelines

Each Evaluation Team member will initially individually assess the submissions and score them against the marking guidelines set out below. Following this process, an average score for the whole team will be agreed for each element of each submission.

The questions within the Award section of Section C Selection & Award will be evaluated against the following marking system:

Score	Description
0	No response (no method statement submitted)
1	Very poor (most or all of the requirements have not been met)
2	Poor (some of the requirements have not been met or only met in part)
3	Meets requirements
4	Good
5	Very good

4.5 Contract Price

The price offered by the Applicant in Section D Pricing Schedule shall be firm and fixed for the period as stated for the duration of the Contract. Any percentage discounts that may be applied must be detailed in the same. Price variation during the term of Contract will be by negotiation only via formal performance review meetings. Any price variations will not take effect until they have been mutually agreed by both Authority and Applicant and the former receives confirmation in writing from the latter.

Should the Contract be extended to its full term, any price variations will be by negotiation only, following the process as stated above.

All prices submitted shall be in pounds sterling and shall be exclusive of Value Added Tax (VAT).

Section D Pricing Schedule will be evaluated in accordance with the criteria and weightings as set out in this Section A Instructions and Information and will form part of the Award section therein. Applicants are expected to provide a full breakdown of all associated costs plus a total cost for the Contract. It is the total cost that will be subject to evaluation.

The Applicant that submits the lowest price below the maximum available budget will score maximum marks out of a possible one hundred (100) and Applicants submitting higher prices will be awarded marks proportionate to their distance from the lowest price.

It is the costs for the whole life of the Contract that are subject to evaluation.

4.6 Clarification and Circular Advices

If your organisation has any questions relating to any part of this questionnaire or to the procurement process as a whole, please contact the Procurement Representative detailed within this Section A Instructions and Information.

Invitation to Tender

Strategic Housing Market Assessment

There will be no negotiations of any of the substantive terms of the documents. Only clarification queries relating to the documents will be answered.

Applicants shall submit all clarification questions via the Supplying the South West e-Tendering portal before twelve (12) noon on the date given at 3.3 Procurement Timetable of this Section A Instructions and Information.

Applicants should note that unless your question is innovation based, responses will be provided to all Applicants. The identity of Applicants raising any questions will remain confidential.

Any instruction by the Council prior to the due date will be issued to all Applicants via the Supplying the South West e-Tendering portal.

If during the period the Authority or Awarding Authority in the case of a Framework Agreement issues any circular letters to Applicants in order to clarify or alter part of the documents, then such circular letters shall form part of the Contract and Applicants shall be deemed to have taken account of them in preparing their bid. Applicants shall also promptly acknowledge any circular letters that they receive.

4.7 Presentation (if applicable)

The Authority reserves the right to invite Applicants, to attend a presentation/interview at which stage it will be a requirement to reinforce your position by presenting your bid to the key stakeholders involved.

Short listed Applicants will be contacted to be invited to the presentation/interview. The invite will detail the date, time and location and the required content of the presentation/interview, which will include any specific questions/topics to be covered.

Applicants short listed and invited to presentation/interview must be available for the timescales indicated within this Section A Instructions and Information. The specific date and time for each Applicant's presentation/interview will be finalised in due course.

Presentations/interviews will be for the purpose of ensuring that shortlisted Applicants have full comprehension of all that is required under this Contract and that all information submitted is accurate. This exercise will be for clarification purposes and may lead to revised scoring as part of the evaluation, should clarification elucidate issues that would otherwise have been unclear.

4.8 Rejection of Offers

The Authority may at its absolute discretion refrain from considering or reject any offer if: it is incomplete or vague or is submitted later than the prescribed date and time; or it is not in accordance with the approved format and all other provisions of the documents or is in breach of any condition contained within it.

Any Submission in respect of which the Applicant:

Has directly or indirectly canvassed any Official, Member or Officer of any of the Authority or obtained information from any other person who has been contracted to provide the Service to the Authority concerning the award of the Contract or who has directly or indirectly obtained or

Invitation to Tender

Strategic Housing Market Assessment

attempted to obtain information from any such Official, Member or Officer concerning any other Applicant; or

Fixes or adjusts the prices shown in Section D Pricing Schedule by or in accordance with any agreement or arrangement with any other person; or

Communicates to any person other than the Authority the amount or approximate amount of the prices shown in Section D Pricing Schedule except where such disclosure is made in confidence in order to obtain quotations necessary for the preparation of the bid or for the purposes of insurance or financing; or

Enters into any agreement with any other person that such other person shall refrain from submitting an offer or shall limit or restrict the prices to be shown or referred to by another Applicant; or

Offers to agree to pay to any person having direct connection with the procurement process or does pay or give any sum of money, inducement or valuable consideration, directly or indirectly, for doing or having done or causing or having caused to be done in relation to any other Applicant or any other person's proposal, any act or omission,

shall not be considered for acceptance and shall accordingly be rejected by the Authority provided always that such non-acceptance or rejection shall be without prejudice to any other civil remedies available to the Authority or any criminal liability which such conduct by a Applicant may attract.

4.9 Acceptance of Offers

The Authority shall accept what it considers to be the Most Economically Advantageous Tender. The Authority 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. The Authority is prepared to consider part bids as appropriate.

4.10 Award of Contract

Submitted documents shall constitute an irrevocable offer to provide the Services. Any acceptance of it by the Authority shall be communicated in writing to the Applicant. Upon such acceptance the Contract shall become binding on all parties.

The successful Applicant shall conclude a formal Contract with the Council, which shall embody the Applicant's offer. No Applicant may consider itself successful unless and until a formal Contract has been signed by a Duly Authorised Officer of the Authority and co-signed by the Applicant's Authorised Officer.

The offer shall remain open for acceptance for a period of six (6) months from the closing date for the receipt of Submissions.

4.11 Bribery Act

The Bribery Act 2010 modernises the law on bribery and came in to force on 01 July 2011. The Act requires Public Bodies to ensure that they have procedures in place to prevent bribery by persons associated with them. As part of this responsibility all Applicants should make themselves aware of the obligations set out at <http://www.justice.gov.uk/legislation/bribery>.

Invitation to Tender

Strategic Housing Market Assessment

A5 UNDERSTANDING THE PROCUREMENT DOCUMENTATION

5.1 Structure of the Document

5.1.1 Structure and Explanation

This document is split in to five (5) sections as follows:

Sections for Information	Sections for Completion and Return
Section A Instructions and Information	Section C Selection & Award
Section B Specification	Section D Pricing Schedule
	Section E Forms

For the avoidance of doubt only those Section numbered C to E, inclusive, and the completed on-line Qualification questions require completion and Submission by the Applicant. The Submission of Sections C to E and the completed on-line Qualification questions will be considered by the Authority to be a fully complete and official offer. Any Submissions made omitting any one or more of Section C to E, or any of the requirements therein, or the on-line Qualification questions will be considered as incomplete and will be treated as such.

Documents should only be completed in the format in which they currently appear and resubmitted in the original sections as stated above. It is essential that Applicants do not re-format, re-brand or consolidate any of the sections in accordance with their own standards on formatting in order to aid the Authority's evaluation process. Applicants are expected to read, understand and agree to all sections of the document as it will in its entirety form part of the resultant Contract. A Submission checklist is enclosed in Section E Forms for all Applicants to complete.

Further details on the on-line Qualification questions can be found at 4.3 Qualification of this Section A Instructions and Information.

The Contract Terms and Condition of Contract applicable to this opportunity can be found on the Supplying The South West e-Tendering portal. Applicants will be required to declare that they have read and understood and will comply with said clauses as part of the document return process as detailed at 5.7 Return of Document of this Section A Instructions and Information.

5.1 Study of the Document

Documents issued by the Authority to a prospective Applicant must not be passed on to a third party without the express permission of the Authority.

The Applicant is required to examine the documents and to obtain all information as it may require them to make a bid. The Applicant shall be deemed to have satisfied itself as to the correctness and sufficiency of its Submission.

No claims whatsoever shall be entertained arising out of the Applicants failure to study the documents; the information you provide will be relied upon as being true and accurate and will form part of the Contract for the successful Applicant. If any of the information given by your

Invitation to Tender

Strategic Housing Market Assessment

organisation within the document is subsequently identified as being inaccurate, this may exclude your organisation from further consideration.

Applicants shall be deemed to have satisfied themselves before making their Submission as to the accuracy and sufficiency of the prices and rates as stated in Section D Pricing Schedule which shall (except in so far as it is otherwise provided in the Contract) cover all obligations under the Contract and Applicants shall also be deemed to have obtained for itself all necessary information as to risks, contingencies and any other circumstances which might reasonably influence or affect its bid.

The Applicant is responsible for obtaining all information necessary for the preparation of its bid and all costs, expenses and liabilities incurred by the Applicant in connection with it shall be borne by the Applicant.

5.2 Completion of Documents

All entries such as rates, price totals or any other endorsements entered must be typewritten in English.

Applicants will answer all appropriate questions and sign (if possible) where specified. You may continue on a separate sheet where necessary. Applicants will clearly reference its replies and any supporting documentation.

Any pro-formas must be fully completed even if your organisation has previously submitted information. It is not sufficient to cross-refer to previous responses.

5.3 Innovative Offers

Innovative offers may be made in addition to making a full and complete Submission. The Submission of an innovative offer will not be considered if the Applicant fails to make a complete Submission in the prescribed format.

5.4 Alternatives and Variations

Should the Applicant wish to offer a variation or alternative to the Specification detailed within this document, including innovations to any Services identified, please complete the Tender as described, answering the questions asked against the Specification provided at Section B and submitting the relevant pricing within Section D Pricing Schedule: the 'standard bid'. Your alternative or variant bid should be prepared separately and submitted as such, giving clear details of your organisation's departure from the specification or where your innovations alter other parts of the Tender, for example any Contract clauses or pricing. No alternative or variant shall be considered by the Authority without the Submission of a 'standard' bid.

5.5 Discrepancies, Omissions and Enquiries concerning the Documents

Should the Applicant find discrepancies in, or omissions from, the documents, the Authority's Procurement Representative shall be immediately notified by the Applicant.

5.6 Errors and Omissions

Should any additions or deletions to the documents be considered necessary prior to the date for Submission, these will be issued by the Authority to Applicants and will be deemed to then form part of the documents; the Authority reserves the right to extend any date of Submission accordingly.

If the Authority discovers errors or omissions in the offer, the Applicant may be required to justify the price or item(s) concerned. Any price adjustments to the offer made by agreement

Invitation to Tender

Strategic Housing Market Assessment

between the Authority and the Applicant shall be confirmed in writing by the Applicant to the Authority before final acceptance by the Authority.

5.7 Return of Document

Documents must be returned electronically via the Supplying The South West Tenders e-Tendering portal. Should you experience any problems with Supplying The South West, please contact the support desk swsupport@due-north.com or call 0844 334 5204. This line is available between 08:30 and 17:00 Monday to Friday (excluding English bank holidays).

Submissions must be received in advance of the deadline in order to qualify as timely offers. As such, Applicants are urged to make their Submission well in advance of the stated time or date in order to avoid such issues as technical difficulties with the electronic system that may be due to the high volume of traffic attempting to submit offers on the same date at the same time, for example.

Submissions made after the date and time specified on the documents or to a different address, electronically or otherwise, will not be considered under any circumstances.

5.8 Non Submission

If no offer is to be made, this must be indicated via the Supplying The South West portal. In order that the Authority can better understand its Applicant base, your comments regarding the reasons behind your non-Submission would also be appreciated. These can also be made via the Supplying The South West portal.

5.9 Ownership

The documents which constitute the offer and all copies thereof are and shall remain the property of the Authority and save for the purposes of the bid, must not be copied or reproduced in whole or in part and must be returned to the Authority upon demand.

5.10 Applicant's Warranties

In submitting their offer the Applicant warrants and represents and undertakes to the Authority that it has not done any of the acts or matters referred to in Article 23 of the Public Contracts Regulations 2006 (as amended in 2009) and has complied in all respects with the requirements; It has full power and authority to enter into the Contract and provide the Services will if requested produce evidence of such to the Authority; It is of sound financial standing and the Applicant and its partners, directors, officers and employees are not aware of any circumstances (other than such circumstances as may be disclosed in the audited accounts or other financial statements of the Applicant submitted to the Authority) which may adversely affect such financial standing in the future.

5.11 Authority's Warranties and Disclaimers

The fact that an Applicant has been invited to bid does not necessarily mean that the Applicant has completely satisfied all the Authority's criteria and the Authority may require further information as appropriate and assess this as part of the evaluation process.

The Applicant shall have no claim whatsoever against the Authority in respect of such matters and in particular (but without limitation) the Authority shall not make any payments to the successful Applicant save as expressly provided for in the Contract and (save to the extent set out in the Contract) no compensation or remuneration shall otherwise be payable by the Authority to the Applicant in respect of the services by reason of the specification being different from that envisaged by the Applicant or otherwise.

Invitation to Tender

Strategic Housing Market Assessment

Whilst the information in this document has been prepared in good faith, it does not purport to be comprehensive or to have been independently verified. With the exception of statements made fraudulently, the Authority does not accept any liability or responsibility for the adequacy, accuracy or completeness of such information. The Authority does not make any representation or warranty (express or implied) with respect to the information contained in the document or with respect to any written or oral information made or to be made available to any Applicant or its professional advisors.

Each Applicant to whom the document is sent must make its own independent assessment of the proposed terms after making such investigation and taking such professional advice as it deems necessary to determine its interest in the Contract.

This document is issued on the basis that nothing contained in it shall constitute an inducement or incentive nor shall have in any other way persuaded the Applicant to bid or enter into any other contractual agreement. Under no circumstances shall the Authority be liable to an Applicant in respect of any costs incurred by an Applicant (whether directly or otherwise) in relation to the preparation or Submission of an offer.

Invitation to Tender

Strategic Housing Market Assessment

SECTION B – SPECIFICATION

B1 BACKGROUND

- 1.1 The SHMA for the Exeter and Torbay Housing Market Areas was published in December 2007. The research was based on the analysis of 3,470 interviews conducted with households (which primarily underwrote the housing needs and requirement modelling). This was coupled with the use of secondary data from the 2001 Census, Housing Corporation, HM Land Registry, Office for National Statistics and a range of other sources, along with a qualitative consultation programme with stakeholders.

B2 SIGNIFICANT CHANGES SINCE 2007

- 2.1 Since the original SHMA was published, the global economy has taken a significant downturn and is only now starting slowly to recover. The Coalition Government has introduced severe public spending cuts and radical changes to the planning system. The emphasis is on stimulating economic growth and devolving power to local communities.

National Planning Policy Framework (NPPF)

- 2.2 The NPPF has replaced multiple national policy statements and guidance with an overarching document that sets out national planning policy. The requirement for SHMA remains, though the Taylor Review recommends urgent review of the associated practice guidance that is currently still in place. The NPPF requires local planning authorities to use their evidence base to meet the full, objectively assessed needs for market and affordable housing in the market area. A wide choice of homes should be provided, responding to current and future demographic trends and meeting the needs of different groups over the plan period. The need for different house size, tenure and range of housing in different locations must be identified.
- 2.3 Assessment of and strategies for housing, employment and other uses should be integrated, taking full account of relevant market and economic signals. It is expected that the new SHMA will have a much stronger economic focus, exploring the interrelationship between housing and economic growth, including, for example, the effect on migration and travel patterns. The SHMA should consider existing and emerging economic assessments, strategies and proposals (see paragraphs 2.17-2.21 below) and how housing growth may support local economic aspirations. This will allow the relationship between economic and housing growth to be better understood and planned for as the sub-region continues to move out of recession.

Abolition of Regional Spatial Strategies

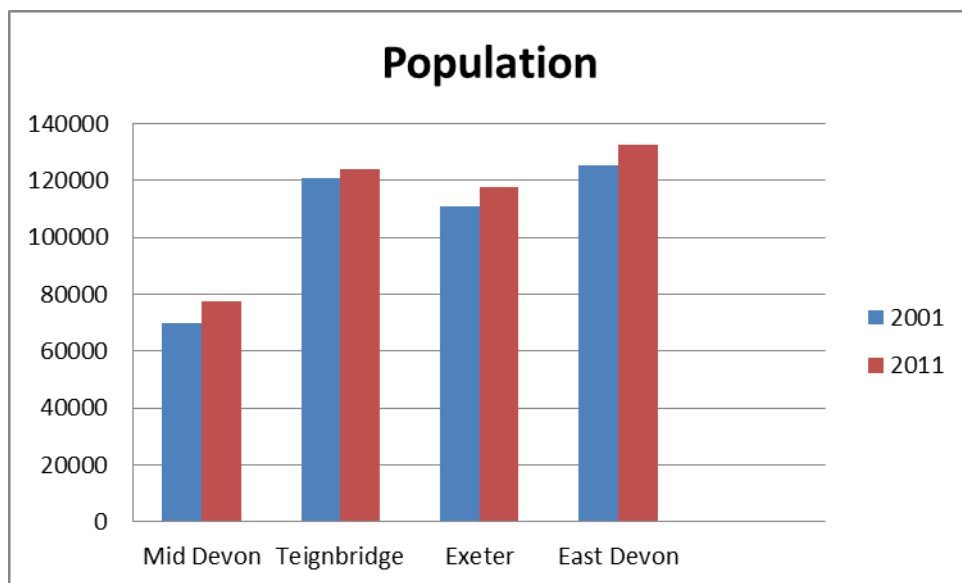
Invitation to Tender

Strategic Housing Market Assessment

- 2.4 The draft Regional Spatial Strategy for the South West was never adopted and was finally revoked on 20 May 2013. The remaining policies of the Devon Structure Plan relevant to the Exeter HMA were revoked at the same time.
- 2.5 As a result of the revocation of the RSS and its evidence base becoming increasingly out of date, the new SHMA should not use the RSS or its evidence base as a starting point. Instead it should start again, using an appropriate methodology to assess the amount and type of new market and affordable housing needed by the local authority.

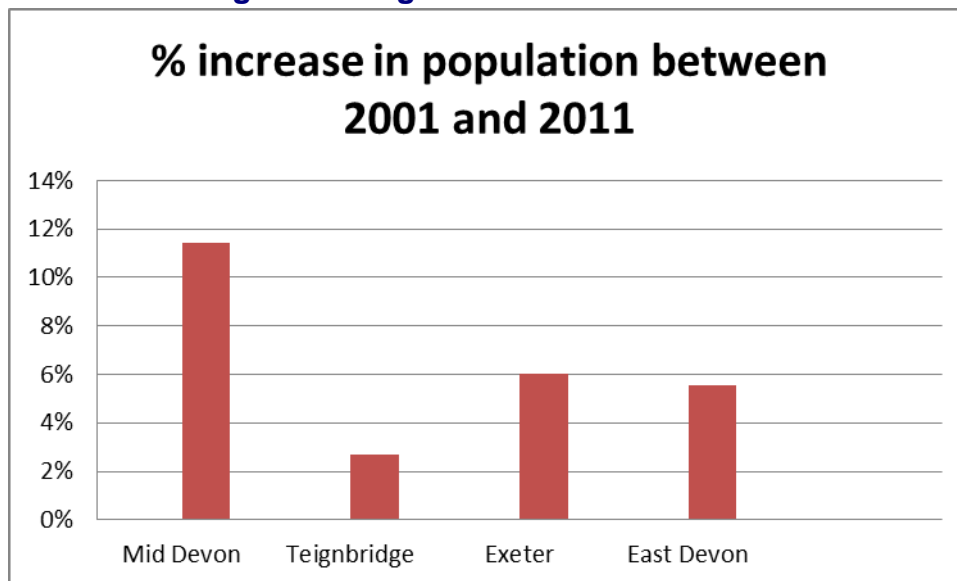
National Census 2011

- 2.6 In July 2012, the initial high-level results of the national Census 2011 were made available including resident population, age and sex at national, regional and local authority level, number of households at national, regional and local authority level and the number of short term migrants at local authority level. Since July 2012, a number of statistical releases have followed which provide further information about the population of the Exeter HMA.
- 2.7 Notably the Census releases indicate a number of changes since the previous Census in 2001. District populations have increased; older age groups are increasing; there is a rise in part-time employment coupled with a decline full time employment; home ownership has declined in favour of renting from private landlords; households with two or more cars/vans have increased; and higher level qualifications have increased.
- 2.8 It is expected that the SHMA will make full use of relevant Census data. The following charts summarise the population increases across the Exeter HMA since the 2001 Census. However, Census data must be used with care if there is differing local evidence to hand. For example, comparison between Census data on household change and Council Tax records in Teignbridge suggests some level of under-reporting on the Census.



Invitation to Tender

Strategic Housing Market Assessment



Localism and Welfare Reform Acts

- 2.9 The Localism Act 2011 devolves decision-making powers from central Government to communities and local authorities. The act covers a wide range of issues related to local public services, with a particular focus on the general power of competence, community rights, neighbourhood planning and housing.
- 2.10 It was through the Localism Act that the Government formalised its intention to abolish Regional Spatial Strategies and introduced the duty to co-operate, requiring local authorities to work together on cross-boundary strategic issues including housing provision.
- 2.11 The Welfare Reform Act 2012 introduces a wide range of reforms to the benefits and tax credits system. The implications of these reforms will need to be explored in relation to any assessment of affordable housing tenure requirements and the private rental market.

Changes to the HCA funding regime and introduction of Affordable Rent

- 2.12 In 2011 the Homes and Communities Agency (HCA) published details of its new Affordable Rent Programme of investment. The framework document outlines the changes in affordable housing provision being introduced for 2011-2015, and how this new approach will meet the Government's ambition to deliver up to 150,000 new homes. The new arrangement introduced the concept of 'affordable rent', which has since been formalised in the NPPF.
- 2.13 Significantly, the way in which funding is allocated has changed. Unlike the previous funding model, providers are now being invited to submit proposals for delivery of affordable housing to the HCA for the entire four year funding programme which will be managed through a flexible approach. Councils may also borrow money to fund new Council housing or assist other registered providers, and the new SHMA should take into account the long-term implications of such alternative delivery mechanisms.

Invitation to Tender

Strategic Housing Market Assessment

Emerging economic plans and priorities

- 2.14 There is currently a national drive to stimulate economic recovery through growth. The Heart of the South West LEP was formally launched in June 2011 as a catalyst for the realisation of economic and commercial potential. The LEP's business plan sets out priorities, objectives, ways of working and measures of success.
- 2.15 The Chancellor's March 2013 Budget Statement emphasised the urgency of delivering enough homes to meet the needs of an increasing number of households, requiring much greater housing provision compared to the last 10 years. The Chancellor announced that "the Government will continue with the reform of the planning system to ensure the regime is simple to access, supports growth and is responsive to housing need."
- 2.16 Devon Local Investment Plans sought to outline and integrate the housing, economic development and infrastructure priorities for the county. Whilst there is no up-to-date overarching spatial strategy for economic development across the county, the draft Devon Strategy for Growth has now been endorsed by Cabinet, and there are various existing and emerging plans and studies, including the Interim and Final Sectors Research reports produced for Devon County Council. District-level studies and reports are briefly outlined below. A key role of the SHMA will be to draw these together to present a coherent analysis of the current and likely future relationship between jobs and homes in the housing market area.
- 2.17 The partner authorities have individually produced the following assessments of and strategies for the delivery of housing, economic growth and infrastructure.

Mid Devon		
Plan/study	Published/adopted	Description
Employment Land Review	2013	See Evidence Base at http://www.middevon.gov.uk/index.aspx?articleid=2495
Retail Study	2012	See Evidence Base at http://www.middevon.gov.uk/index.aspx?articleid=2495
Economic Development Strategy	2012	The strategy sets out the overarching corporate objectives of the Council in promoting economic growth, including an action plan which is in the process of being reviewed. Approved strategy available at http://www.middevon.gov.uk/index.aspx?articleid=4446 .
Housing Needs Assessment	2011	See Evidence Base at http://www.middevon.gov.uk/index.aspx?articleid=2495
Strategic Housing Land Availability Assessment	2010	New SHLAA in progress. Information and previous SHLAA at http://www.middevon.gov.uk/index.aspx?articleid=5596 .

Invitation to Tender

Strategic Housing Market Assessment

Community Housing Strategy 2010-2015	2010	Available at http://www.middevon.gov.uk/CHttpHandler.ashx?id=15761&p=0 . This strategy is in the process of being reviewed.
Homelessness Strategy	Pending	In progress

Teignbridge		
Study/Strategy	Published/Adopted	Description
Employment Land Review	2010	Employment Land Review 2010
Economic Development Delivery Plan	2012	Economic Development Delivery Plan 2012
Exeter HMA update 2010, Teignbridge area	2010	Teignbridge Housing Market Assessment 2010
Exeter HMA update 2012, Teignbridge area	2012	Teignbridge Housing Market Assessment update 2012
Exeter HMA, 2012 update, requirements for Exeter HMA	2013	Exeter Housing Market Area requirements
Teignbridge Strategic Housing Land Availability information	Various	www.teignbridge.gov.uk/shlaa
Teignbridge Gypsy and Traveller needs	2012	Report of assessed housing need, potential site opportunities and plan provision for the Travelling Community in Teignbridge (2012)
Teignbridge Infrastructure Delivery Plan	2013	Infrastructure Delivery Plan April 2013
Retail and Leisure Study	2010	Retail and Leisure Study 2010 volume 1 Retail and Leisure Study 2010 volume 2

East Devon		
Plan/study	Published/adopted	Description
Housing and Employment Review	2011	See Document Library at http://www.eastdevon.gov.uk/emp001-eastdevonhousingandemploymentstudy2011.pdf
Housing and Employment Review Appendices	2011	See Document Library at http://www.eastdevon.gov.uk/emp003-eastdevonhsgandempstudy-finalrep-appendices2011.pdf
Growth Point	2011	See Document Library at

Invitation to Tender

Strategic Housing Market Assessment

Employment and Skills Project		http://www.eastdevon.gov.uk/emp005-ehodemploymentandskillsboardngpemploymentandskillsproject.pdf
Retail Needs Study	2008	See Document Library at http://www.eastdevon.gov.uk/ret001-eastdevonretailneedsstudyandtowncentrehealthcheckfullstudy2008.pdf
Retail Needs Update	2011	See Document Library at http://www.eastdevon.gov.uk/ret003-eastdevonretailneedsstudy-update2011.pdf
SHMA East Devon Update	2011	See Document Library at http://www.eastdevon.gov.uk/hsg020-strategichousingmarketassessmenteastdevonupdate2011.pdf
Homelessness Strategy 2013 - 2018	2013	Available at http://www.eastdevon.gov.uk/homelessnessstrategy2013-18.pdf
Homes and Communities Plan 2012-2016	2012	http://www.eastdevon.gov.uk/homes_and_communities_plan-2.pdf

Invitation to Tender

Strategic Housing Market Assessment

Exeter		
Plan / study	Published / adopted	Description
Employment Land Review	2009	See http://www.exeter.gov.uk/CHttpHandler.ashx?id=15412&p=0
Retail Study	2008	See http://www.exeter.gov.uk/CHttpHandler.ashx?id=15413&p=0
University of Streatham Campus Final Masterplan Framework	2010	See http://www.exeter.gov.uk/CHttpHandler.ashx?id=15426&p=0
Exeter SHMA Update	2010	See http://www.exeter.gov.uk/CHttpHandler.ashx?id=16054&p=0 And http://www.exeter.gov.uk/CHttpHandler.ashx?id=16055&p=0
Strategic Housing Land Availability Assessment	2013	See http://www.exeter.gov.uk/shlaa
Empty Homes Strategy	2009	See http://www.exeter.gov.uk/CHttpHandler.ashx?id=12744&p=0
Homelessness Strategies, Projects and Performance	2008	See http://www.exeter.gov.uk/CHttpHandler.ashx?id=10173&p=0
Housing Strategy	Pending	In progress
Older Persons Housing Strategy	2010	See http://exeter.gov.uk/index.aspx?articleid=1250&detailid=12521

Invitation to Tender

Strategic Housing Market Assessment

Dartmoor National Park		
Plan / study (CD# indicates a Core Document for the DMD examination.)	Published / adopted	Description
CD8/2 Strategic Housing Viability Assessment for DNPA – Levvel Ltd Final Report	March 2011	http://www.dartmoor.gov.uk/_data/assets/pdf_file/0010/238078/CD8-2-Levvel-Dartmoor-report-FINAL.pdf
CD5/14 DNP Strategic Housing Land Availability Assessment	April 2011	http://www.dartmoor.gov.uk/_data/assets/pdf_file/0011/86591/2011-04-07_DNP_SHLAA_2010.pdf
CD5/15 Dartmoor Parish Housing Needs Assessment	Jan 2012	http://www.dartmoor.gov.uk/_data/assets/pdf_file/0009/192735/20120131_Parish_Housing_Needs_Assessments.pdf
CD5/16 Exeter & Torbay Strategic Housing Market Area: Local Area Report for Dartmoor	Dec 2007	http://www.dshg.org.uk/2008_01_28_dnp.pdf
CD8/6 House prices in DNP	2011	http://www.dartmoor.gov.uk/_data/assets/pdf_file/0004/43438/DNP_House_Prices_Report_2011.pdf
CD10/28 Teignbridge Employment Land Review. Final Report. Roger Tym and Partners	Feb 2010	http://www.teignbridge.gov.uk/CHttpHandler.ashx?id=33299&p=0
CD10/29 DNPA Employment Land Review. Aaron Fox	Feb 2010	http://www.dartmoor.gov.uk/_data/assets/pdf_file/0005/238082/CD10-29-DNP-Employment-Sites-Survey-2010.pdf
CD10/31 DNPA Employment sites survey	Mar 2012	http://www.dartmoor.gov.uk/_data/assets/pdf_file/0006/238083/CD10-31-DNP-Employment-Sites-Survey-Update-2012.pdf

Invitation to Tender

Strategic Housing Market Assessment

update 2012. Aaron Fox		
CD10/36 Gypsy & Traveller Transit site identification study. LPC (Trull) Ltd – Main Study	Dec 2010	http://www.dartmoor.gov.uk/_data/assets/pdf_file/0018/43254/g_t_housing_need_assessment_mainreport.pdf
CD10/36 Gypsy & Traveller Transit site identification study. LPC (Trull) Ltd - Appendices	Dec 2010	http://www.dartmoor.gov.uk/_data/assets/pdf_file/0019/43255/g_t_housing_need_assessment_appendices.pdf
Dartmoor Household projections (DCC)	Dec 2007	http://www.dartmoor.gov.uk/_data/assets/pdf_file/0016/43441/pl-dnp_dwelling_projections.pdf

Other sources of information

- 2.18 A range of other relevant information has been made available since the 2007 SHMA was published. Much of the secondary data used in the study has been updated and neighbouring HMAs have updated their own SHMAs. A new SHMA is in progress for West Devon Borough Council and part of Dartmoor National Park Authority (other partners include Plymouth City Council and Cornwall Council), while North Devon and Torridge updated their SHMA in 2012. The Taunton and South Somerset SHMA was carried out in 2009. The SHMA for the Dorset HMAs was completed in 2007/8.
- 2.19 Consideration of these studies as well as any other relevant studies not identified, will allow for a greater understanding of the relationship between the Exeter HMA and adjoining areas, including whether there have been any significant changes since 2007 and whether there is any unmet need from these areas being met by the Exeter HMA.
- 2.20 The tables at paragraph 2.17 show which of the partner authorities have published Housing Needs Assessments since the 2007 SHMA was published. Tender submissions should identify whether differing methodologies in these assessments would cause a problem for the SHMA and if so, what can reasonably be done to ensure the review is robust and fit for purpose.

Progress of Local Plans

- 2.21 The partner authorities have also made varying degrees of progress with their development plans since 2007. The new SHMA will need to take account of these adopted and emerging strategies and any other documents of relevance, such as plans for introducing the Community Infrastructure Levy (CIL).

Invitation to Tender

Strategic Housing Market Assessment

2.22 Local plan and CIL charging schedule progress for each partner authority is summarised in the tables below.

Mid Devon		
Plan/study	Adopted	Description
Local Plan Part 3: Development Management Policies (LP3)	Expected August 2013	Examination in progress. Inspector's report expected late June 2013. Information available at www.middevon.gov.uk/examination .
CIL Charging Schedule	2013	£40 per sqm to be charged for residential development. Cabinet has recommended adoption of the Charging Schedule by full Council on 3 July 2013. The Examiner's report and background evidence can be viewed at http://www.middevon.gov.uk/cil . Implementation is expected in October 2013.
Allocations and Infrastructure Development Plan Document (Local Plan Part 2)	2010	Available at http://www.middevon.gov.uk/CHttpHandler.ashx?id=15292&p=0
Core Strategy	2007	Available at http://www.middevon.gov.uk/CHttpHandler.ashx?id=7872&p=0 .

Teignbridge		
Plan/document	Published/Adopted	Description
Proposed Submission Teignbridge Local Plan	November 2012	Submitted for examination Likely adoption date March 2014. Proposed Submission Teignbridge Local Plan 2013-2033 November 2012
Teignbridge Local Plan Duty to Cooperate statements	May 2013	Approved by Executive, to be submitted with the Local Plan. Duty to cooperate statements
Teignbridge Community Infrastructure Levy Draft Charging Schedule	April 2013	Submitted for examination Teignbridge Community Infrastructure Levy Draft Charging Schedule, April 2013

East Devon		
Plan/study	Adopted	Description
East Devon Local Plan	Expected 2014	Publication November 2012 http://www.eastdevon.gov.uk/publicationdraftnewlocalplan.pdf

Invitation to Tender

Strategic Housing Market Assessment

		submission expected late July 2013 examination expected November 2013
CIL Draft Charging Schedule	Expected 2014	Published for consultation June 2013. Sets out geographically variable CIL levels for residential and retail East Devon District Council - Community Infrastructure Levy
CIL Draft 123 List	Expected 2014	Published for consultation June 2013 http://www.eastdevon.gov.uk/cil02.pdf
CIL IDP	Expected 2014	Published for consultation June 2013 http://www.eastdevon.gov.uk/cildoclibrary4.pdf
Villages Plan	Expected late 2014	This DPD will set out allocations and detailed policies for the villages in East Devon with Built Up Area Boundaries. Consultation draft expected late 2013

Exeter		
Plan / study	Published / adopted	Description
Core Strategy	2012	See http://www.exeter.gov.uk/CHttpHandler.ashx?id=16913&p=0
Development Delivery Development Plan Document	Pending	In progress.
Draft CIL Charging Schedule	Pending	£80 per sqm to be charged for residential development. Public Examination took place in February 2012 and the Inspector's Report is awaited. The Draft Charging Schedule and background evidence can be viewed at http://www.exeter.gov.uk/index.aspx?articleid=14459

Dartmoor National Park Authority		
Plan / study	Adopted	Description
Core Strategy 2006 -2026 DPD	April 2008	Strategic policies for DNP http://www.dartmoor.gov.uk/_data/assets/pdf_file/0012/4320/3/pl-core_strategy_adopted-2.pdf
Development Management & Delivery DPD 2006 – 2026 (DMD)	(Proposed) July 2013	General development management policies plus site allocations http://www.dartmoor.gov.uk/planning/pl-forwardplanning/pl-localdevframework/pl-development_management_and_delivery_development_plan_document
Affordable Housing SPD Issues Paper	Issues Paper published May 2013. (Adoption proposed Dec 2013)	Guidance to support the Core Strategy & DMD http://www.dartmoor.gov.uk/_data/assets/pdf_file/0007/3372/73/2013-04-24_Affordable_Housing_SPD_Issues.pdf

Invitation to Tender

Strategic Housing Market Assessment

B3 PROJECT SPECIFICATION

- 3.1 The overarching purpose of the project is to prepare a new SHMA on behalf of the Exeter HMA partner authorities, to estimate the overall need for new homes, split into need by district/area. This will replace the previous SHMA published in December 2007 and have a stronger economic dimension to accord with the NPPF.
- 3.2 With regard to approach and methodology, the partner authorities invite suggestions and whilst maintaining the ability to make meaningful comparisons with the previous SHMA will be important, the local authorities are not tied to the previous methodology. The Government has announced that national planning guidance outside the NPPF will be overhauled and this is likely to include the SHMA guidance, though a timescale for this is unknown.
- 3.3 As such, it is considered that the study should, as a minimum, aim to meet the core outputs and process checklist set out in the 2007 Strategic Housing Market Assessment Guidance (Version 2). Should further guidance be issued within the timeframe of the SHMA commission, the appointed consultant will be expected to respond to this as far as is reasonably possible.
- 3.4 Having regard to the 2007 SHMA, the requirements of the practice guidance and the duty to co-operate, set out below are a number of key outputs that are expected to be delivered through the study.

Key Outputs

i) Defining the extent of the Housing Market Area

- 3.5 The RSS allocated housing targets to local authorities according to their defined housing market areas. This amounted to 15,000 homes in Exeter, 17,100 in East Devon, 7,400 in Mid Devon and 15,900 in Teignbridge.
- 3.6 A key requirement of the new SHMA will be to confirm the current extent of the Exeter HMA and identify any particular changes that have occurred since 2007. In particular, in line with the duty to co-operate, consideration must be given to the links with adjoining housing market areas and whether they have strengthened to the extent that the boundary of the HMAs should be revised. Particular regard should be had to any SHMAs produced and/or updated for adjoining housing market areas since 2007.

ii) Identification of Key Drivers

- 3.7 The 2007 SHMA identified a number of housing market drivers underpinning and influencing the sub-regional housing market. Since then, evidence of household composition, population trends, migration, local economy and access to services has

Invitation to Tender

Strategic Housing Market Assessment

changed. The new SHMA should identify the key drivers of most significance in 2013 and beyond.

- 3.8 A key consideration will be economic performance including recent and planned business growth and the current desire to stimulate economic recovery through housing delivery. Related to this is the potential relationship between housing stock and future age structure of the labour force, as well as the relationship between income and house prices. The new SHMA should make use of the Sectors Research Interim Report to Devon and Somerset County Councils and Dartmoor National Park Authority (October 2012) and the Sectors Research Final Report to Devon County Council (February 2013). The new SHMA should understand and explain the inter-relationship between economic performance and housing demand, including the potential benefit of housing supply on the economy as well as the constraints that the economy can place on housing demand and supply.
- 3.9 Modelling of the impact of housing provision on affordability should be included if possible. A key planning objective is to bring the housing market back into balance in order to bring private housing back within the reach of more households. Increasing overall housing supply should reduce the need for affordable housing over time. The new SHMA should also include some analysis of the impact of house prices and affordability on migration.

iii) Assessment of the Current Housing Market

- 3.10 Drawing on a range of primary and secondary data, the 2007 SHMA considered a number of different aspects of the current housing market, including the existing housing stock, existing households in housing need and the dynamics of affordability according to tenure, housing mix and house prices.
- 3.11 The new SHMA is expected to include a detailed assessment of the current sub-regional housing market and as part of this, to identify any significant changes since 2007 including, for example, housing affordability and any increases in rates of homelessness. The early effects of welfare reform and Affordable Rent should be assessed alongside an analysis of the private rental market. There should be an assessment of the impacts of welfare reform (freeze on LHA rates, benefits cap, removal of 5 bed LHA, council tax support scheme etc.) on the availability and affordability of private sector accommodation.
- 3.12 The most up-to-date information available should be used, such as from Devon Home Choice and Share to Buy, and consideration should be given as to whether there are any additional sources of information not used previously that would provide added value.
- 3.13 Particular regard should be had to household groups with specific household requirements including, for example, families with children, single people/childless couples, older people, people with disabilities, service families, people wishing to build their own homes. The new SHMA should consider the demand for downsizing as a

Invitation to Tender

Strategic Housing Market Assessment

result of reductions in housing benefit for under-occupied homes. The study does not need to assess gypsy and traveller needs, as these are the subject of a new Gypsy and Traveller Accommodation Assessment being prepared for multiple Devon local authorities at the same time as the new SHMA. The new SHMA should take account of the Joint Strategic Needs Assessment, prepared by Devon County Council and the NHS to assess the health and social care needs across Devon, and advise on the provision of specialist accommodation for the elderly. The SHMA should have regard to the Devon County Council Commissioning Strategy for Extra Care Housing, the Accommodation and Support JNSA for Mental Health (2010) and the Accommodation and Support JSNA for Adults with a Learning Disability (2010), as well as local authority homelessness strategies.

- 3.14 If possible it would also be useful to disaggregate market demand sectors, such as 'starter' vs. 'family' homes and 'executive' vs. 'later life' homes. In Exeter City, the student population is a key demographic driver which will need to be taken into account, as will the demands of an ageing population particularly in rural areas.

iv) Assessment of Future Housing Market

- 3.15 This is perhaps the most important part of the SHMA and as a minimum, proposals should aim to meet the core outputs and process checklist in the practice guidance.
- 3.16 In particular, using the best available information, an assessment should be made of the total number of future households for all partner authorities, broken down by age and type, covering the period up to 2035 and shown in 5 year tranches. This should take into account economic growth aspirations and the balance between labour and housing markets.
- 3.17 Drawing from Devon County's Councils population forecasts and future demand modelling, and current housing need, an estimate should be provided of the total number of future households that will require affordable housing over the period to 2035. This should be supported by an assessment of the different tenures of affordable housing needed in each partner authority area (social rent, affordable rent and intermediate housing) recognising that affordable rent may remain out of reach to many of those in housing need. The SHMA should recognise the wide variety of 'intermediate' affordable homes, and analyse the implications of household projections with regard to hidden households, affordability and existing suppressed need/demand. It would be useful to know the affordability level and income level required for each intermediate option such as shared ownership/equity products at 40%, 50%, 70% and 80%, and intermediate rented and low cost homes for sale. There has been a recent increase in the number of people joining the register for South West Homes, and the partner authorities need to have clear information on the income levels needed to afford each product and which is the most desirable intermediate option for local residents.

Invitation to Tender

Strategic Housing Market Assessment

- 3.18 In assessing existing and future housing need, regard should be had to the HNA reports already in place, with a clear explanation provided for any significant differences in the findings of the new SHMA, such as the new demand for one and two bedroom properties due to the reduction in housing benefit for under-occupied homes.
- 3.19 In parallel, an assessment should be made of the total number of future households requiring market housing, again broken down on a local area basis. Where possible, an assessment of the size, type and tenure of market housing needed should also be provided. Specific advice should also be provided on the future needs and demands of particular groups identified earlier, such as families, older people, disabled people, service families and those wishing to the build their own home. In Exeter City, it would be useful to identify the need for additional student accommodation, bearing in mind existing provision and the City Council's policies on this issue. In all cases, a distinction should be drawn between the need for and demand for housing.
- 3.20 It is essential that both market and affordable homes are large enough to meet the needs of occupiers. Some local planning authorities, including Mid Devon District Council, are now proposing minimum dwelling size standards, applying the Housing Quality Indicators developed by the Homes and Communities Agency for affordable housing. This responds to evidence of UK housing being considerably smaller than is found elsewhere in Europe. The new SHMA should take account of this evidence, such as The Case for Space: the size of England's new homes (RIBA, 2011) and Building The Homes and Communities Britain Needs (Future Homes Commission, 2012), and comment on the size of housing required to meet the needs of the Exeter HMA.
- 3.21 There should be some discussion in the new SHMA about the extent to which it is feasible to provide for housing need away from its source. What is the potential to move the housing provision into a neighbouring district for strategic planning reasons and what would be the implications? This will influence future discussions between partner authorities about the distribution of housing between districts, should such discussions become necessary under the duty to co-operate.
- 3.22 To summarise, in accordance with the NPPF, a clear, objectively assessed estimate of future housing need and demand across the HMA is needed to support the development of future local housing targets. This information should be broken down to the district/local area level as fully as possible in the period up to 2035, in order to help inform future discussions concerning the location of growth and the relationship to labour markets.

v) Previous 2007 SHMA recommendations

- 3.23 The 2007 SHMA concluded that housing and planning authorities across the sub-region should work together with the development industry, housing associations, delivery agencies and funders to deliver the housing required across the whole market, and find a range of solutions to address the need for affordable housing.

Invitation to Tender

Strategic Housing Market Assessment

- 3.24 The new SHMA should consider any areas not explored in the 2007 study and review the conclusions of it. The new SHMA must also reflect upon any separate work commissioned or undertaken by individual authorities since the original SHMA was produced, such as local SHMA updates and HNAs.
- 3.25 The effects of wider legislative and national policy changes since 2007 should also be considered. There is a need for updated conclusions on the demand for social rented housing, tenure movement and private renting, in view of welfare reform including direct payment of housing benefit, and the housing element of universal credit.

vi) Stakeholder Engagement

- 3.26 To ensure effective stakeholder 'buy-in', tender submissions should include an explanation of the type and extent of stakeholder engagement proposed to be undertaken as part of the SHMA process and the timing of when this will take place.
- 3.27 The Strategic Housing Land Availability Assessment (SHLAA) is prepared according to the advice of a stakeholder panel that represents a cross-section of the house-building industry in the Exeter HMA. The views of the SHLAA Panel should be properly taken into account, and the new SHMA achieve consensus regarding the findings of the study, as far as possible.

vii) Ongoing Monitoring and Updating

- 3.28 It will be important that the new SHMA is produced in a format that can be kept up-to-date easily, allowing local authorities to maintain it with minimum resource requirements or specialist knowledge. This will include the release of electronic spreadsheets, modelling and raw data so as to provide the local authorities with the option of updating the findings on a regular, in-house basis. Updates should make use of Devon County Council's statistics and modelling data unless otherwise justified.
- 3.29 Alternatively, if they are able to offer such a service, consultants are invited to provide a fixed-fee proposal for the provision of an annual update to the SHMA on behalf of the partner authorities.

viii) Final Reporting

- 3.30 The full SHMA should be accompanied by a succinct Executive Summary which clearly sets out the key findings and recommendations, broken down on a district basis where appropriate.
- 3.31 The report should be useable, easy to understand and visually engaging in terms of its legibility and format. Clear outputs should be provided and the use of multiple scenarios, which may be open to interpretation, should be avoided.
- 3.32 Consideration should be given to font and layouts so that the final document is not excessively long for printing purposes. Graphs can be used as visual aids when the

Invitation to Tender

Strategic Housing Market Assessment

issue being discussed relates to comparisons, but they should not be overused when data could be more helpful in tables. Maps are welcome providing that the information is clear, relevant and useful.

- 3.33 The full SHMA report and Executive Summary should be provided electronically in Adobe pdf format at A4 size, suitably compressed for website hosting and download, to facilitate circulation.
- 3.34 Where appropriate and applicable, any constituent parts of the SHMA should be provided in other, accessible formats including:
- .doc or .rtf format for text
 - .xls format for numerical workings and graphs
 - .jpg, .gif or .tif format for photos and images
- 3.35 A total of 20 hard copies at standard A4 size should be supplied of both the full SHMA report and Executive Summary (if separate).
- 3.36 The consultants' name will appear as the authors of the reports and senior officers of the consultancy will sign the report. The report should be 'open for public use'. The copyright in the completed reports and any annexes will belong to the partner authorities. The partner authorities will retain ownership of the final reports, any data collected and any analysis that is undertaken as part of this study.

Compliance with Legislation

- 3.37 The contractor is responsible for ensuring that in the undertaking of any work for the Council that it fulfils all the requirements of UK and EU law together with all health and safety and equality and diversity legislation. The contractor must inform the Council immediately if it suspects that it has in any way breached any UK and EU legislation in the performance of the contract.

Contractual arrangements

- 3.38 The supplier will ensure timely delivery of the report within the agreed timetable.
- 3.39 The supplier must provide a copy of their standard terms and conditions/draft contract, and indicate the degree to which terms may be negotiated.
- 3.40 The Councils will seek to include penalty clauses for unjustified delays to the project

Invitation to Tender

Strategic Housing Market Assessment

SECTION C – SELECTION & AWARD

Method Statement Number	Method Statement Topic Area
C1.1	<p>Experience (Worth 100%)</p> <p>Please provide details of contracts carried out in the past three (3) years for the provision of services similar to those required by the Partnering Authorities.</p> <p>Your response should include contracts currently being undertaken and those which have been completed and include:</p> <ul style="list-style-type: none"> i) Customer name and address ii) Contact name and telephone number iii) Contract reference and description of services undertaken iv) Date of completion (if applicable) <p>NB. The Contracting Authority may elect to contact any of the above companies for a reference, prior to award of contract. Your permission to do so will be assumed unless you state any objections.</p>

Method Statement Number	Method Statement Topic Area
C2.1	<p>Organisation History (information only)</p> <p>In no more than 500 words please provide a brief history and outline of your organisation.</p>
C2.2	<p>Quality Assurance (Worth 10%)</p> <p>Does your organisation hold a recognised quality management certification and/or is a member of a relevant trade/professional body such as BS/EN/ISO9001?</p> <p>If yes, please detail those certificates held and/or trade/professional membership details.</p> <p>If not, does your organisation have a quality management arrangement in place (including processes/procedures that are compliant with legal requirements)? Please provide details.</p>
C2.3	<p>Technical capacity and expertise (Worth 15%)</p>

Invitation to Tender

Strategic Housing Market Assessment

	<p>Please provide your organisation's technical capacity and expertise which will be used to deliver the contract. Please include qualifications and training of staff that would be involved in the delivery of this contract along with a proposed staffing structure.</p>
C2.4	<p>Understanding and addressing the project specification (Worth 35%)</p> <p>Please provide a detailed method statement setting out your understanding of the brief and how you intend to fulfil each of the key outputs.</p> <p>Submissions should confirm that all outputs specified in this brief can be achieved by the proposal and any elements where this is in doubt should be clearly stated. This should include an assessment of whether additional primary research is required for the purposes of identifying housing need, and if so, a breakdown of what is required for each partner authority area if the requirements vary among them. The partner authorities wish to rely on secondary data wherever feasible, consistent with the guidance and the need to maintain a robust evidence base. Where primary research is proposed this must be properly justified.</p> <p>The successfully appointed consultant will be expected to undertake effective and collaborative stakeholder consultation throughout the project. Submissions should therefore include details of the amount, type and timing of stakeholder engagement envisaged and how it will be used to inform the final report.</p> <p>Submissions should include a clear project plan with key milestones highlighted as appropriate. Submissions should also explain how the proposed approach will comply with national policy and best practice.</p> <p>Proposals which allow for joint working between more than one pre-identified consultant on the basis that each has a specific contribution to make to the success of the project will be considered, provided that the proposed framework for joint working is sufficiently robust.</p>
C2.5	<p>Terms & Conditions (information only)</p> <p>Please provide a copy of your standard terms and conditions/draft contract, with confirmation of negotiable terms.</p>
C2.6	<p>Statement of Costs</p> <p>Please provide a statement to support the costs provided at D1. This should include time inputs by individual, by task and day rate. VAT should be shown separately.</p>

Invitation to Tender

Strategic Housing Market Assessment

SECTION D – PRICING

D1 PRICING SCHEDULE

- 1.1 The budget for this project will be held by Mid Devon District Council on behalf of the partner authorities. All partner authorities assume liability for a portion of the cost, to be formalised through a legally binding partnership agreement prior to the commissioning of consultants.
- 1.2 Payments will be phased with 50% of the fee payable on satisfactory completion of a draft report and the remaining 50% on approval of the final report.
- 1.3 A statement on costs should be included in the tender at Section C2.6.

	Costs for the Whole Life of the Contract
Fixed fee quotation for SHMA report	
Fixed fee quotation for provision of annual update to SHMA on behalf of partner authorities	
Day rate	
If you have identified 'other costs' please state what these are	

Invitation to Tender

Strategic Housing Market Assessment

D2 PRICING SCHEDULE DECLARATION

I / We offer to supply the goods or services as per the pricing schedule above, in accordance with the Specification, terms and conditions and all other documents forming the Contract.

Signed*:	Date:
Name (<i>in block capitals</i>):	
In the capacity of: (<i>State official position, i.e. Director, Manager, etc.</i>)	
Organisation name and postal address:	
Telephone No:	Fax No:
<i>*(It must be clearly shown whether the Applicant is a limited company, statutory corporation, partnership or single individual, trading under his own or another name, and also if the signatory is not the actual Applicant, the capacity in which he/she signs or is employed).</i>	

Invitation to Tender

Strategic Housing Market Assessment

SECTION E – FORMS

E1 SUBMISSION CHECKLISTS AND INFORMATION TO READ AND COMPLETE

Applicants to complete the checklist forms below by providing a signature (scanned or typewritten) against each item and return with their submission. This will constitute agreement and will form part of the Contract.

Sections for Information

Section	Method Statement	Applicant Read, Understood and Agreed
Section A Instructions and Information	Instructions and Information	
Section B Specification	Specification	

Sections for Completion and Submission

Section	Method Statement	Completed and Submitted
Section C Selection & Award	Qualification Questions (online)	
Section C Selection & Award	Selection Question C1.1	
Section C Selection & Award	Award Questions C2.1-C2.5	
Section D Pricing Schedule	Pricing Schedule	
Section D Pricing Schedule	Detailed statement of costs	
Section D Pricing Schedule	Pricing Schedule Declaration	
Section E Forms	Submission Checklist and Information to Read and Complete	
Section E Forms	Organisation Information	
Section E Forms	Conditions of Tender	
Section E Forms	Certificate of Undertaking and Absence of Collusion or Canvassing	
Section E Forms	Certificate of Confidentiality	
Section E Forms	Equalities Monitoring Form	
Section E Forms	Supplier Feedback Form	

Invitation to Tender

Strategic Housing Market Assessment

E2 ORGANISATION INFORMATION

Section A – Consortia Arrangements (if applicable)

Please refer to section 4.5 Consortia and Sub-Contracting within Section A Instructions and Information

Are you making a submission as a Consortium?	Yes/No (Please delete, if no please go onto Section C)
Name of Lead Applicant	
Name/s of Organisation/s involved	
Structure and Management of the Consortium	
Nature and Extent of Involvement of each Organisation	

Please also complete Section C with the Lead Applicant's information

Section B – Sub Contracting Arrangements (if applicable)

Please refer to section 4.5 Consortia and Sub-Contracting within Section A Instructions and Information

Is your organisation proposing to Sub-Contract any part of the Contract?	Yes/No (Please delete, if no please go onto Section C)
Name of Lead Applicant	
Name/s of proposed Sub-Contractors	
Provide detail of which parts of the Contract will be Sub-Contracted and to whom	

Please also complete Section C with the Lead Applicant's information

Section C – Lead Applicant Information

Name and address of the organisation (prime/single contractor/lead partner) in whose name the Contract would be awarded to:	
Address: Postcode: Tel. No:	Fax. No. Email address: Website address (if any):
Insert a contact name for enquiries about this bid and their job title and contact details.	
Name: Job Title:	Tel. No: Fax. No. Email address:
Company Registration number (if applicable) and date of registration.	
Companies House registration number of the parent company (if applicable).	

Invitation to Tender

Strategic Housing Market Assessment

Charities or Housing or other Registration number (if applicable). Please specify the registering body and date of registration	
Provide registered address details if different from above.	
Address: Postcode:	Tel. No:
State the VAT registration number (if applicable).	
Full name(s) and details of Executive Directors/Partners/Trustees.	
Name	Responsibility

Invitation to Tender

Strategic Housing Market Assessment

E3	CERTIFICATES
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MID DEVON DISTRICT COUNCIL	
CONDITIONS OF TENDER	
<p>Tender for: Strategic Housing Market Assessment Period of Contract: Contract period to be up to a period of one (1) year with an option to extend up to a period of one (1) further year</p>	<p>Tender No: SWCE-99BDPF Due for return by 5pm on: 26th July 2013</p>
1.	<p>Tenders are invited for the supply of the goods or services specified or described in the invitation. Tenders with conditions of contract duly completed should be marked with SHMA and returned electronically via the Supplying the South West portal. Tenders must be returned no later than 5pm on 26th July 2013. Tenders received after the time stated or not properly completed will be disregarded. Facsimile and emailed copies will not be accepted.</p>
2.	<p>The Contract shall be subject to the Authority's Standard Conditions of Contract. Wherever special conditions of Contract are contained in the Invitation to Tender, the Contract shall be subject to those special conditions in addition to the Standard Conditions of Contract, and where those special conditions are inconsistent with the Authority's Standard Conditions of Contract, the special conditions shall prevail. Offers by Applicants made subject to additional or alternative conditions may not be considered and may be rejected on the grounds of such conditions alone. No alteration must be made to the printed conditions or schedules. Any Tenders bearing such alterations will not be considered.</p>
3.	<p>The Authority does not bind itself to accept the lowest or any Tender, and reserves the right to accept a Tender either in whole or in part, for such item or items specified in the Invitation to Tender, and for such place or places of delivery as it thinks fit, each item and establishment being for this purpose considered as Tendered for separately.</p>
4.	<p>To Mid Devon District Council I/We the undersigned DO HEREBY UNDERTAKE on the acceptance by the Authority of my/our Tender either in whole or in part, to supply (<i>or perform the services</i>), on such terms and conditions and in accordance with such specifications (<i>if any</i>), as are contained or incorporated in the Invitation to Tender. I/We agree and declare that the acceptance of this Tender by letter on behalf of the Authority, whether for the whole or part of the items included therein, will constitute a Contract for the supply of such items, I/We agree to enter into a further agreement for the due performance of the Contract, and I/We declare that I am/We are acting as the Delegated Authority for the purposes of signing off this Tender, and therefore, the Contract.</p>
Signed*:	
Date:	
Name (<i>in block capitals</i>):	
In the capacity of:	
<i>(State official position, i.e. Director, Manager, etc.)</i>	
* <i>(It must be clearly shown whether the Applicant is a limited company, statutory corporation, partnership or single individual, trading under his own or another name, and also if the signatory is not the actual Applicant, the capacity in which he/she signs or is employed).</i>	

Invitation to Tender

Strategic Housing Market Assessment

CERTIFICATE OF UNDERTAKING AND ABSENCE OF COLLUSION OR CANVASSING

The Applicant shall sign the below Certificate of Undertaking and Absence of Collusion (overleaf), clearly indicating whether they sign as a Consortium or Member of Consortium (Box A), or as a single body and/or individual (Box B) by striking through Box A or B, whichever does not apply.

Box A – Consortium

I/We the undersigned do hereby certify that:-

- (a) the consortium's Tender is bona fide and intended to be competitive;
- (b) the consortium has not entered into any agreement with any person outside the consortium with the aim of preventing Tenders being made or asked the amount of another Tender of the conditions or which the Tender is made;
- (c) the consortium has not informed any person outside the consortium other than the person calling for the Tenders the amount or approximate amount of the Tender except where the disclosure in confidence of the approximate amount of the Tender was necessary to obtain insurance premium or other quotations necessarily required for the preparation of the Tender;
- (d) the consortium has not caused or induced any person to enter into such an agreement as is mentioned in (b) above or to inform the consortium of the amount or the approximate amount of any rival Tender for the Contract.
- (e) the consortium has not and will not canvass or solicit any Member, Officer or employee of the Authority in connection with the preparation, submission and evaluation of this Tender or award or proposed award of the Contract and that to the best of my knowledge and belief, no person employed by the consortium or acting on the consortium's behalf has done or will do such an act.
- (f) I/We further undertake that the consortium will not do any of the acts mentioned in (b), (c), (d) and (e) above before the hour and date specified for the return of the Tender.

Box B – Single Body and/or Individual

I/We the undersigned do hereby certify that:-

- (a) My/our Tender is bona fide and intended to be competitive and I/we have not fixed or adjusted the amount of the Tender by or under in accordance with any agreement or arrangement with any other person;
- (b) I/we have not indicated to any person other than the person calling for the Tender amount or approximate amount of the proposed Tender except where the disclosure in confidence of the approximate amount of the Tender was necessary to obtain insurance premium or other quotations necessarily required for the preparation of the Tender;
- (c) I/we shall have not entered into any agreement or arrangement with any other person that they shall refrain from Tendering or asked the amount of any Tender to be submitted;
- (d) I/we have not offered to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other Tender or proposed Tender for the said work any act or thing of the nature specified and described above.
- (e) I/we hereby certify that I/we have not and will not canvass or solicit any Member, Officer or employee of the Authority in connection with the preparation, submission and evaluation of this Tender or award or proposed award of the Contract and that to the best of my knowledge and belief, no person employed by me/us or acting on my/our behalf has done or will do such an act.
- (f) I/we further undertake that I/we will not do any of the acts mentioned in (d), (c) and (d) above before the hour and date specified for the return of the Tender

Signed*:

Date:

Name (in block capitals):

In the capacity of:

(State official position, i.e. Director, Manager, etc.)

*(It must be clearly shown whether the Applicant is a limited company, statutory corporation, partnership or single individual, trading under his own or another name, and also if the signatory is not the actual Applicant, the capacity in which he/she signs or is employed).

Invitation to Tender

Strategic Housing Market Assessment

CERTIFICATE OF CONFIDENTIALITY

I/we hereby agree with the Authority that I/we shall not at any time divulge or allow to be divulged to any person any information, confidential or otherwise, relating to information passed to me regarding this project.

It is appreciated by the parties that in the event of negotiations in respect of the proposed Contract being entered into between the Authority and my organisation that it may be necessary to share information with colleagues within my organisation. In this event this confidentiality clause may be waived to allow such information sharing to take place but not further or otherwise.

Signed*:

Date:

Name (*in block capitals*):

In the capacity of:

(State official position, i.e. Director, Manager, etc.)

**(It must be clearly shown whether the Applicant is a limited company, statutory corporation, partnership or single individual, trading under his own or another name, and also if the signatory is not the actual Applicant, the capacity in which he/she signs or is employed).*

Invitation to Tender

Strategic Housing Market Assessment

E4	EQUALITIES MONITORING FORM
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For all Applicants to answer

This information is for monitoring purposes only. Read the definitions below and indicate whether the organisation falls into any of the listed categories.

Applicant may tick more than one box.

4.1	Is the organisation: (select one option (i) to (viii) only)	
(i)	a public limited company	Yes/No
(ii)	a sole trader	Yes/No
(iii)	a limited company	Yes/No
(iv)	a partnership	Yes/No
(v)	a not for profit limited company	Yes/No
(vi)	a Community Interest Company or Charitable Incorporated Organisation	Yes/No
(vii)	a registered Charity	Yes/No
(viii)	Other (specify):	
4.2	An SME Business Owner (SME) is a small or medium sized enterprise that has either less than 250 employees or with an annual turnover of less than €40 Million Euro, or both. Is your business an SME? If yes, tick the category in which the organisation best fits:	Yes/No
	Micro (<10 employees)	
	Small (<50 employees)	
	Medium-Sized (<250 employees)	
4.3	A Woman Business Owner (WBO) is an enterprise where women owners hold a majority ownership of the business. Is the organisation a WBO?	Yes/No
4.4	A Disabled Business Owner (DBO) is an enterprise where disabled business owners hold a majority share ownership of the business. Is the organisation a DBO?	Yes/No

Invitation to Tender

Strategic Housing Market Assessment

4.5	A Black Minority and Ethnic (BME) business is an enterprise where the majority share ownership of the business is held by members of a minority ethnic group. Is the organisation a BME?	Yes/No
4.6	A third sector organisation. If yes, tick the category in which the organisation best fits:	
	Voluntary sector organisation	
	Social Enterprise	
	Not-for-Profit organisation	
	Charity	
4.7	Is your business none of the above?	

Invitation to Tender

Strategic Housing Market Assessment

E5	SUPPLIER FEEDBACK FORM
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The Authority values the Applicants that apply for the opportunities that it makes available and as such its Corporate Procurement Officer is keen to ensure that all Applicants have their say about how procurement processes are conducted. Whilst it is not compulsory for Applicants to complete the below, all organisations are encouraged to take a few minutes to do so in order for the Corporate Procurement Officer to continuously evaluate the delivery of service and to aid in improving processes.

Applicants are asked to complete the supplier feedback document in relation to this particular procurement.

Questions	Very Satisfied	Satisfied	Neither	Dissatisfied	Very Dissatisfied	Not Applicable / Don't Know
Place a cross in the box that applies						
Thinking about any contact that you have had with the Procurement Representative named in the procurement document, how satisfied are you that...						
They were professional and polite						
They provided complete and accurate information when asked						
They demonstrated knowledge of the procurement process						
Thinking about this procurement opportunity, how satisfied were you...						
That it was handled in a timely and professional manner						
That I was provided with sufficient and appropriate information about the process						
With the overall procurement opportunity						
Thinking about the procurement process, how satisfied are you that...						
The procurement documentation is easy to understand						

Invitation to Tender

Strategic Housing Market Assessment

and structured in a way that is straightforward						
You had sufficient time to offer a suitable response						
The e-Tendering system is easy to use						
What aspects of this process are you particularly pleased with and/or what suggestions do you have that might enable the Authority to improve the procurement process?						