

WHOLE HOUSE REFURBISHMENT AND ASSOCIATED WORKS

2ND MARCH 2020 - 1ST MARCH 2024

WH2 FRAMEWORK GUIDE



ABOUT THIS FRAMEWORK

This SPA framework was developed to provide an efficient, value for money procurement route for the delivery of public sector housing refurbishment works.

The tender was carried out in strict accordance with the EU Procurement Directive and UK public sector procurement rules.

The framework will run for a maximum of four years. However, individual call-off projects can be completed beyond the four-year duration of the framework as long as a contract is in place prior to the framework expiry date. The framework is split into two workstreams which can operate independently from one another.

Workstream 1 - Whole House Refurbishment Specialisms

Kitchens and Bathrooms

Electrical Works

Heating Services

Landscaping

Painting & Decorating

Workstream 2 - Multi-Disciplinary Works

As well as the specialist works listed in Workstream 1, this workstream is for the delivery of a wide range of whole house refurbishment works including any of the following additional works:

- > Heating and electrical
- > Disabled adaptations
- > Supply, renewal of gas fired central heating and upgrading of boilers
- > Electric heating installations
- > Roofing

- > Electrical wiring
- > Cladding
- > Renewal of windows and doors, including fire doors

NB: This is not a definitive list of works. Please contact SPA for a full list.

Please read the ITT service specifications (Section C) for more details on the works provided as part of this framework. These specifications are available on request.



SPA provides OJEU compliant frameworks, which can be used by local authorities, social landlords and other public sector bodies to procure works, products and services for the construction, refurbishment and maintenance of social housing, schools and public buildings.

All SPA frameworks have been established in strict compliance with the Scottish public sector procurement rules for use by publicly or partially publicly funded organisations in Scotland.

SPA is backed by LHC, established in 1966 and acknowledged as one of the most experienced and respected providers of procurement frameworks in the construction sector.

Scottish Procurement Alliance (SPA)

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spa-scottish-procurement-alliance

APPOINTED COMPANIES* EAST SCOTLAND

*Listed Alphabetically

WORKSTREAM 1

£250,000 to £2million per annum

WORKSTREAM 2

£0 - £250,000 per annum

£250,000 to £2million per annum

EAST SCOTLAND 1
UKM 76, 77, 78

EAST SCOTLAND 2
UKM 72

EAST SCOTLAND 3
UKM 71, 77

EAST SCOTLAND 4
UKM 75

EAST SCOTLAND 5
UKM 73

Kitchens & Bathrooms	Landscaping	Electrical Works	Painting & Decorating	Heating Services
CCG (Scotland) Everwarm First Call Trade Services L&D Plumbing & Tiling Services Novus Property Solutions	L&D Plumbing & Tiling Services Novus Property Solutions	BRB Everwarm G D Chalmers L&D Plumbing & Tiling Services Novus Property Solutions	First Call Trade Services L&D Plumbing & Tiling Services Novus Property Solutions Trident Maintenance Services	BRB British Gas Social Housing ta PH Jones CCG (Scotland) Everwarm First Call Trade Services Novus Property Solutions

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Multi-Disciplinary	Multi-Disciplinary
CCG (Scotland) Everwarm Hugh LS McConnell Novus Property Solutions Procast Building Contractors	Everwarm Hugh LS McConnell Novus Property Solutions Procast Building Contractors

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APPOINTED COMPANIES* WEST CENTRAL SCOTLAND

*Listed Alphabetically

WORKSTREAM 1

£250,000 to £2million per annum

WORKSTREAM 2

£0 - £250,000 per annum £250,000 to £2million per annum

WEST CENTRAL 1
- UKM 84, 95

Kitchens & Bathrooms	Landscaping	Electrical Works	Painting & Decorating	Heating Services
CCG (Scotland) Everwarm First Call Trade Services Lochlie Construction Novus Property Solutions	Contract Building Services L&D Plumbing & Tiling Services Novus Property Solutions	Contract Building Services Everwarm G D Chalmers Lochlie Construction Novus Property Solutions	Contract Building Services First Call Trade Services L&D Plumbing & Tiling Services Novus Property Solutions Trident Maintenance Services	British Gas Social Housing ta PH Jones CCG (Scotland) Everwarm First Call Trade Services Lochlie Construction Novus Property Solutions

Multi-Disciplinary	Multi-Disciplinary
CCG (Scotland) Everwarm Hugh LS McConnell Novus Property Solutions Procast Building Contractors	Hugh LS McConnell Lochlie Construction Novus Property Solutions Procast Building Contractors

WEST CENTRAL 2
UKM 93, 94

Kitchens & Bathrooms	Landscaping	Electrical Works	Painting & Decorating	Heating Services
CCG (Scotland) Everwarm First Call Trade Services Lochlie Construction Novus Property Solutions	Contract Building Services L&D Plumbing & Tiling Services Novus Property Solutions	BRB Contract Building Services Everwarm G D Chalmers Lochlie Construction Novus Property Solutions	Contract Building Services First Call Trade Services L&D Plumbing & Tiling Services Novus Property Solutions Trident Maintenance Services	British Gas Social Housing ta PH Jones CCG (Scotland) Everwarm First Call Trade Services Lochlie Construction Novus Property Solutions

Multi-Disciplinary	Multi-Disciplinary
CCG (Scotland) Everwarm First Call Trade Services Hugh LS McConnell Novus Property Solutions Procast Building Contractors	Everwarm Hugh LS McConnell Lochlie Construction Novus Property Solutions Procast Building Contractors

WEST CENTRAL 3
UKM 82

Kitchens & Bathrooms	Landscaping	Electrical Works	Painting & Decorating	Heating Services
CCG (Scotland) Everwarm First Call Trade Services Lochlie Construction Novus Property Solutions	Contract Building Services L&D Plumbing & Tiling Services Novus Property Solutions	Contract Building Services Everwarm G D Chalmers Lochlie Construction Novus Property Solutions	Contract Building Services First Call Trade Services L&D Plumbing & Tiling Services Novus Property Solutions Trident Maintenance Services	British Gas Social Housing ta PH Jones CCG (Scotland) Everwarm First Call Trade Services Lochlie Construction Novus Property Solutions

Multi-Disciplinary	Multi-Disciplinary
CCG (Scotland) Everwarm Hugh LS McConnell Novus Property Solutions Procast Building Contractors	Hugh LS McConnell Lochlie Construction Novus Property Solutions Procast Building Contractors

WEST CENTRAL 4
UKM 81

Kitchens & Bathrooms	Landscaping	Electrical Works	Painting & Decorating	Heating Services
CCG (Scotland) Everwarm First Call Trade Services Lochlie Construction Novus Property Solutions	Contract Building Services L&D Plumbing & Tiling Services Novus Property Solutions	BRB Contract Building Services Everwarm G D Chalmers Lochlie Construction Novus Property Solutions	Trident Maintenance Services Contract Building Services First Call Trade Services L&D Plumbing & Tiling Services Novus Property Solutions	British Gas Social Housing ta PH Jones CCG (Scotland) Everwarm First Call Trade Services Lochlie Construction Novus Property Solutions

Multi-Disciplinary	Multi-Disciplinary
CCG (Scotland) Contract building Services Everwarm Hugh LS McConnell Novus Property Solutions Procast Building Contractors	Everwarm Hugh LS McConnell Lochlie Construction Novus Property Solutions Procast Building Contractors

WEST CENTRAL 5
UKM 83

Kitchens & Bathrooms	Landscaping	Electrical Works	Painting & Decorating	Heating Services
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Multi-Disciplinary	Multi-Disciplinary
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For lower value works refer to our Whole House Refurbishment Dynamic Purchasing System (DPS)
The DPS will generally apply to minor building works projects valued up to £250k per project.

For details of the DPS and all of our other frameworks see our website:
www.scottishprocurement.scot/dps/

TENDER AND EVALUATION PROCESS

This was a two stage Restricted Tender, with an initial Selection Questionnaire stage, followed by shortlisted tenderers being invited to submit an Invitation to Tender (ITT) response.

Selection Questionnaire Documents & Evaluation

Applicants were required to complete the ESPD Selection Questionnaire which included:

- > **mandatory questions** - Including grounds for exclusion of applicants based on criminal convictions and the non-payment of taxes, insolvency, professional misconduct and non-payment of social security contributions.
- > **minimum insurance cover** - Minimum of £5 million insurance cover for Public Liability, Employees Liability and Professional Indemnity.
- > **financial due diligence** - Applicants were assessed on their turnover and Credit Safe financial assessment score. The results of this check were assessed on a pass/fail basis.

Selection Questionnaire Documents & Evaluation

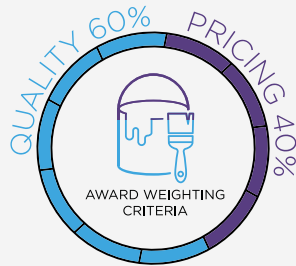
Applicants were required to obtain a quality score of over 60% to progress to the ITT stage.

- | | | | |
|-------------------------------|-----|----------------------|-----|
| > three relevant case studies | 30% | > social value | 20% |
| > technical capability | 30% | > project resourcing | 20% |

ITT Documentation

The ITT evaluation process comprised two main elements, requiring tenderers to respond to technical and quality questions, and to complete a pricing schedule.

The ITT assessment weighting is **60/40** Quality/Price criteria with the sum of both scores establishing the Most Economically Advantageous Tenders (**MEAT**).



Community Benefits

The appointed suppliers' commitment to social value was evaluated during the tender process but SPA encourage clients to include requirements for community benefits projects and social value initiatives in their call-off contracts.

Technical and Quality Questions

Tenderers provided written statements and evidence of their technical ability to provide the works as outlined in the service specifications for Workstream 1 (Specialist Services) and Workstream 2 (Multi-disciplinary). The Specification document (Section C) details the works and services to be delivered through the Framework Agreement. The service specifications and pricing schedules are based on the M3NHF specifications for Planned Maintenance & Property Reinvestment Works version 7. A pdf copy of the NHF service specifications and pricing schedules were provided as part of the tender documents.

The Technical/Quality questions in the ITT are as follows and comprise a total weighting of **60%**:

- | | | | |
|---------------------|-----|-----------------------|----|
| > Project Resources | 10% | > Defects Resolution | 7% |
| > Safe Working | 10% | > Contract Management | 7% |
| > Customer Care | 10% | > Social Value | 6% |
| > CDM Compliance | 10% | | |

Pricing Schedule

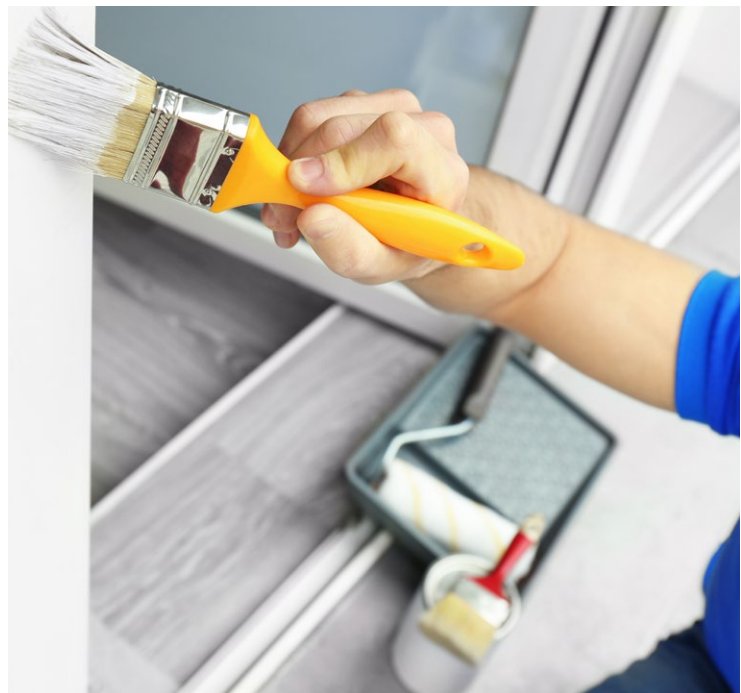
M3NHF schedule of rates version 7 has been used as the baseline for pricing this framework agreement. However other elements of pricing have been weighted and scored to comprise the total pricing weighting of **40%**, these are:

- | | |
|--|-----|
| > Profits, overheads and preliminary costs | 20% |
| > NHF rates and regional uplift | 10% |
| > Scenario price | 10% |

Planned Maintenance & Property Reinvestment Works version 7

All prices offered for all items are the companies' maximum rates they can charge under this framework agreement.

All prices on the framework are subject to an annual uplift to allowable fluctuation adjustments taken from the construction Output Price Index (OPI 2015=100 series) Housing Repairs and Maintenance as published by the Office of National Statistics.



CALL-OFF AWARD OPTIONS

The Framework allows clients the option of:

Direct award without further competition, where all terms and conditions of the call-off project are within the terms and conditions of the framework

OR

Mini-competition, where terms and conditions of the call-off may vary or be modified from the framework or at the choice of the Client.

When calling off projects, clients can use any one of a range of standard forms of building contract including JCT/SBCC, NEC3/NEC4, ACE, PPC, TPC, FAC1, or their own in-house agreement.

Eligibility

SPA is a not-for-profit organisation, governed by public law and a central purchasing body providing procurement services. Over 100 publicly funded organisations throughout Scotland use SPA frameworks to procure works, goods and services to construct, refurbish and maintain social housing, schools and public buildings:

- > Scottish Registered Social Landlords (RSL's)
- > Registered Tenants Organisations (RTOs)
- > Local Authorities
- > Subsidiaries, Joint-Venture Companies and Arm's Length Management Organisations (ALMOs)
- > NHS Scotland Boards
- > Universities and Further Education Establishments
- > Police Scotland
- > Scottish Fire and Rescue Service
- > Registered Charities

Details of those contracting authorities identified are listed at www.scottishprocurement.scot/24

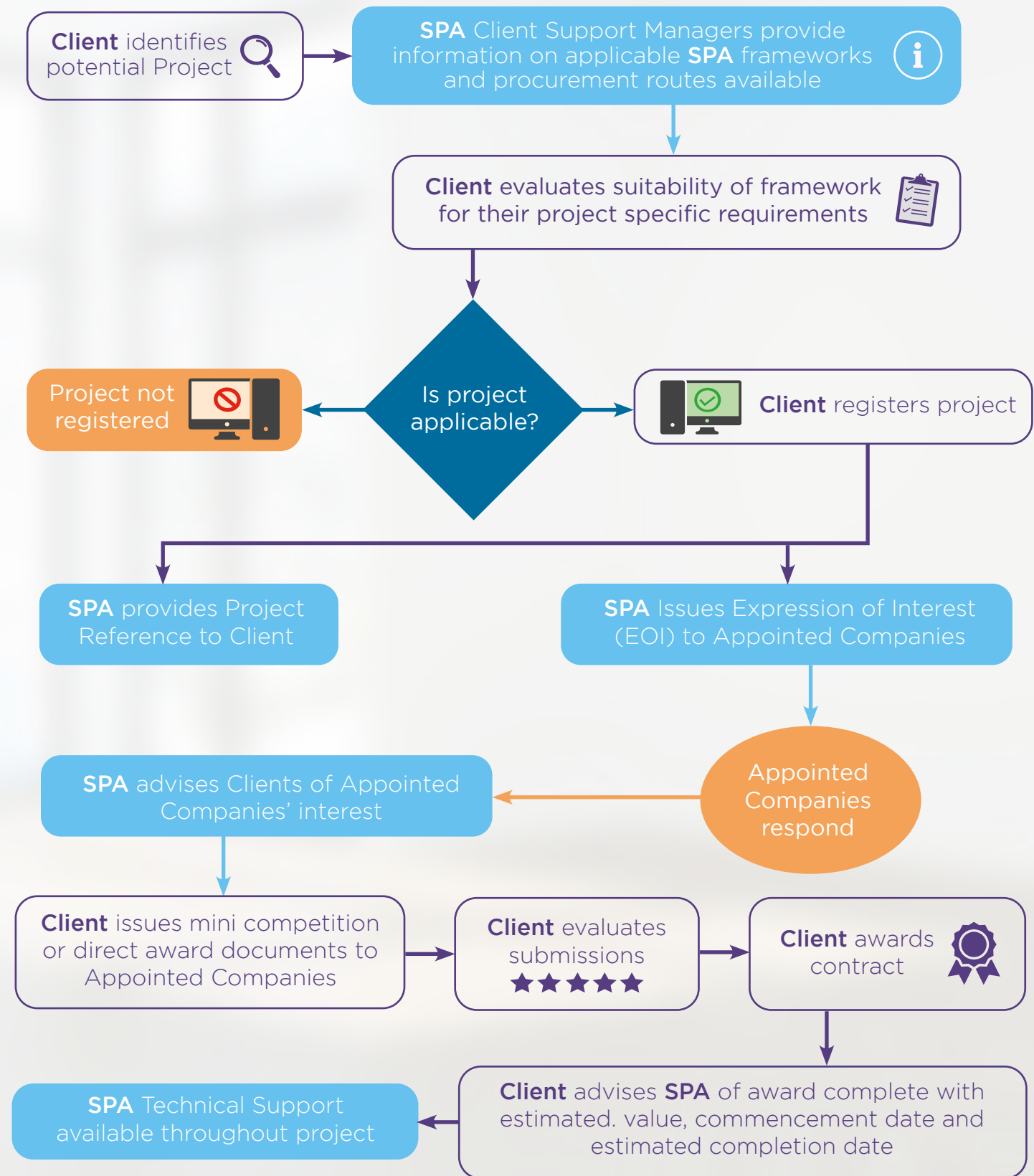
Accessing the Framework

Companies appointed to SPA frameworks are required to pay a small percentage ('the levy' of the total value of every invoice submitted to clients and to submit quotations to clients that are inclusive of the levy. As a not-for-profit organisation, SPA returns surplus levy income to our clients to support social value initiatives in the local communities they serve.

General Terms and Conditions

LHC uses the FAC1 standard form of contract to manage our frameworks. The LHC pro forma, which should be read in conjunction with the FAC1 in published form, details the terms and conditions that govern the operation of the framework, including the procedures to call off projects under the framework. A free copy of the LHC proforma is available upon request. The FAC1 in standard published form can be purchased at a negotiated rate from ACA, by emailing office@acarchitects.co.uk and quoting discount code reference: LHCFAC2516102017.

THE PROCESS OF USING OUR FRAMEWORK





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better buildings and homes