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Tender

## **Framework for the Provision of Legal Services**

Caledonia Housing Association

F02: Contract notice

Notice identifier: 2025/S 000-001822

Procurement identifier (OCID): ocids-h6vhtk-04d484

Published 20 January 2025, 10:21am

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

Caledonia Housing Association

Suite 4 Saltire House, 3 Whitefriars Crescent

Perth

PH2 0PA

#### **Contact**

Stuart Robertson

#### **Email**

[stuart.robertson@caledoniaha.co.uk](mailto:stuart.robertson@caledoniaha.co.uk)

#### **Telephone**

+44 8006781228

#### **Country**

United Kingdom

**NUTS code**

UKM - Scotland

**Internet address(es)**

Main address

[www.caledoniaha.co.uk](http://www.caledoniaha.co.uk)

Buyer's address

[https://www.publiccontractsscotland.gov.uk/search/Search\\_AuthProfile.aspx?ID=AA17204](https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA17204)

**I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://www.publiccontractsscotland.gov.uk>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.publiccontractsscotland.gov.uk>

Electronic communication requires the use of tools and devices that are not generally available. Unrestricted and full direct access to these tools and devices is possible, free of charge, at

<https://www.publiccontractsscotland.gov.uk>

**I.4) Type of the contracting authority**

Body governed by public law

**I.5) Main activity**

Housing and community amenities

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## **Section II: Object**

### **II.1) Scope of the procurement**

#### **II.1.1) Title**

Framework for the Provision of Legal Services

Reference number

2025-01-LS

#### **II.1.2) Main CPV code**

- 79100000 - Legal services

#### **II.1.3) Type of contract**

Services

#### **II.1.4) Short description**

Caledonia Housing Association Group, consisting of Caledonia Housing Association and its subsidiary, Cordale Housing Association, invites suitably qualified and experienced legal service providers to express their interest in participating in the tender for the Framework Agreement for the Provision of Legal Services.

The Group is one of Scotland's leading Registered Social Landlords, dedicated to providing high-quality, affordable homes for those in housing need. We currently own and manage approximately 6,000 homes across Tayside, Fife, the Highlands, East and West Dunbartonshire, and North Lanarkshire. For further information about the Group and its subsidiary, please visit:

[www.caledoniaha.co.uk](http://www.caledoniaha.co.uk); [www.cordalehousing.org.uk](http://www.cordalehousing.org.uk)

The Framework Agreement will have an initial term of three years, with the option of a one-year extension, contingent upon satisfactory performance.

#### **II.1.5) Estimated total value**

Value excluding VAT: £4,000,000

#### **II.1.6) Information about lots**

This contract is divided into lots: Yes

Tenders may be submitted for maximum number of lots  
2

Maximum number of lots that may be awarded to one tenderer: 2

The contracting authority reserves the right to award contracts combining the following lots or groups of lots:

Any two lots.

## **II.2) Description**

### **II.2.1) Title**

Conveyancing, Contractual & Procurement and General Legal Issues

Lot No

1

### **II.2.2) Additional CPV code(s)**

- 79110000 - Legal advisory and representation services
- 79111000 - Legal advisory services
- 79112000 - Legal representation services
- 79130000 - Legal documentation and certification services
- 79140000 - Legal advisory and information services
- 79100000 - Legal services

### **II.2.3) Place of performance**

NUTS codes

- UKM - Scotland

Main site or place of performance

Across Scotland

### **II.2.4) Description of the procurement**

- a. Procurement and contract-related issues, including those in the context of new build housing developments.
- b. Conveyancing services and advice, including issues related to property sales through low-cost home ownership schemes.
- c. Legal advice on agreements pertaining to acquisitions and disposals.
- d. General legal guidance on services provided by Registered Social Landlords, excluding those covered by other specialist lots.

#### **II.2.5) Award criteria**

Quality criterion - Name: Technical / Weighting: 50

Quality criterion - Name: Sustainability / Weighting: 20

Price - Weighting: 30

#### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months

36

This contract is subject to renewal

Yes

Description of renewals

The Framework Agreement will have an initial term of three years, with the option of a one-year extension, contingent upon satisfactory performance

#### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 5

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: No

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

## **II.2) Description**

### **II.2.1) Title**

Finance, Governance and Employment Issues

Lot No

2

### **II.2.2) Additional CPV code(s)**

- 79100000 - Legal services
- 79110000 - Legal advisory and representation services
- 79111000 - Legal advisory services
- 79112000 - Legal representation services
- 79130000 - Legal documentation and certification services
- 79140000 - Legal advisory and information services

### **II.2.3) Place of performance**

NUTS codes

- UKM - Scotland

Main site or place of performance

Across Scotland

### **II.2.4) Description of the procurement**

a. Compliance with employment policies and practices, with advice on related matters such as TUPE, dispute resolution, grievance and disciplinary issues, pensions, and settlement agreements.

- b. Representation in Employment Tribunals and Employment Appeal Tribunals.
- c. Governance and compliance issues, focusing on group structures, legislative and regulatory requirements, and constitutional matters.
- d. Advice on information governance issues, including provision of Data Protection Officer services.
- e. Advice on funding arrangements and financial agreements with lenders.
- f. Standard Security legal work.

#### **II.2.5) Award criteria**

Quality criterion - Name: Technical / Weighting: 50

Quality criterion - Name: Sustainability / Weighting: 20

Price - Weighting: 30

#### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months

36

This contract is subject to renewal

Yes

Description of renewals

The Framework Agreement will have an initial term of three years, with the option of a one-year extension, contingent upon satisfactory performance.

#### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 5

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: No

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

## **II.2) Description**

### **II.2.1) Title**

Housing & Estate Management Issues

Lot No

3

### **II.2.2) Additional CPV code(s)**

- 79100000 - Legal services
- 79110000 - Legal advisory and representation services
- 79111000 - Legal advisory services
- 79112000 - Legal representation services
- 79130000 - Legal documentation and certification services
- 79140000 - Legal advisory and information services

### **II.2.3) Place of performance**

NUTS codes

- UKM - Scotland

Main site or place of performance

Across Scotland

### **II.2.4) Description of the procurement**

a. Compliance with Housing Management policies and practices, and guidance on issues such as tenancy and arrears management, and associated legal obligations.

b. Managing complaints, including those escalated to the Ombudsman or tribunal stage.



- c. Court representation, including raising actions for tenancy breaches and defending actions raised against Caledonia or its employees.
- d. Income recovery, including both current and former tenant arrears, recharges, and any other debt owed to the Association.
- e. Legal actions related to anti-social behaviour, including ASBOs, interdicts, and possession recovery.
- f. Guidance on housing-related legislation, including leases, management agreements, alternative tenures, and tenancy regimes.
- g. Pursuing legal action against third parties raised by the Association.
- h. Factoring services and fulfillment of associated obligations.
- i. Legal advice on issuing notices and other relevant legal documents.

#### **II.2.5) Award criteria**

Quality criterion - Name: Technical / Weighting: 50

Quality criterion - Name: Sustainability / Weighting: 20

Price - Weighting: 30

#### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months

36

This contract is subject to renewal

Yes

Description of renewals

The Framework Agreement will have an initial term of three years, with the option of a one-year extension, contingent upon satisfactory performance.

#### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 5

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: No

#### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

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### **Section III. Legal, economic, financial and technical information**

#### **III.1) Conditions for participation**

##### **III.1.2) Economic and financial standing**

Selection criteria as stated in the procurement documents

##### **III.1.3) Technical and professional ability**

Selection criteria as stated in the procurement documents

#### **III.2) Conditions related to the contract**

##### **III.2.1) Information about a particular profession**

Execution of the service is reserved to a particular profession

Reference to the relevant law, regulation or administrative provision

The bidder must provide proof of a valid licence issued by the Law Society of Scotland.

##### **III.2.3) Information about staff responsible for the performance of the contract**

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract

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### **Section IV. Procedure**

## **IV.1) Description**

### **IV.1.1) Type of procedure**

Restricted procedure

### **IV.1.3) Information about a framework agreement or a dynamic purchasing system**

The procurement involves the establishment of a framework agreement

Framework agreement with several operators

Envisaged maximum number of participants to the framework agreement: 3

### **IV.1.8) Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: Yes

## **IV.2) Administrative information**

### **IV.2.2) Time limit for receipt of tenders or requests to participate**

Date

19 February 2025

Local time

5:00pm

### **IV.2.3) Estimated date of dispatch of invitations to tender or to participate to selected candidates**

10 March 2025

### **IV.2.4) Languages in which tenders or requests to participate may be submitted**

English

### **IV.2.6) Minimum time frame during which the tenderer must maintain the tender**

Duration in months: 3 (from the date stated for receipt of tender)

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: No

### **VI.2) Information about electronic workflows**

Electronic invoicing will be accepted

Electronic payment will be used

### **VI.3) Additional information**

NOTE: To register your interest in this notice and obtain any additional information please visit the Public Contracts Scotland Web Site at

[https://www.publiccontractsscotland.gov.uk/Search/Search\\_Switch.aspx?ID=788151](https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=788151).

The buyer has indicated that it will accept electronic responses to this notice via the Postbox facility. A user guide is available at

[https://www.publiccontractsscotland.gov.uk/sitehelp/help\\_guides.aspx](https://www.publiccontractsscotland.gov.uk/sitehelp/help_guides.aspx).

Suppliers are advised to allow adequate time for uploading documents and to dispatch the electronic response well in advance of the closing time to avoid any last minute problems.

A sub-contract clause has been included in this contract. For more information see:

<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2363>

Community benefits are included in this requirement. For more information see:

<https://www.gov.scot/policies/public-sector-procurement/community-benefits-in-procurement/>

A summary of the expected community benefits has been provided as follows:

Bidders will be required to deliver community benefits retrospectively proportionate to the annual spend under the contract.

(SC Ref:788151)

Download the ESPD document here:

[https://www.publiccontractsscotland.gov.uk/ESPD/ESPD\\_Download.aspx?id=788151](https://www.publiccontractsscotland.gov.uk/ESPD/ESPD_Download.aspx?id=788151)

### **VI.4) Procedures for review**

**VI.4.1) Review body**

Perth Sheriff Court and Justice of the Peace Court

County Building, Tay Street

Perth

PH2 8NL

Country

United Kingdom