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Planning

Provision of Portfolio Management & Appraisal Services Framework

West Yorkshire Combined Authority

F01: Prior information notice

Prior information only

Notice identifier: 2023/S 000-009374

Procurement identifier (OCID): ocids-h6vhtk-03b785

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Section I: Contracting authority

I.1) Name and addresses

West Yorkshire Combined Authority

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Buyer's address

<https://uk.eu-supply.com/ctm/Company/CompanyInformation/Index/103257>

I.3) Communication

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

<https://uk.eu-supply.com/ctm/Supplier/Documents/Folder/65156>

Additional information can be obtained from the above-mentioned address

I.4) Type of the contracting authority

Regional or local authority

I.5) Main activity

General public services

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Provision of Portfolio Management & Appraisal Services Framework

Reference number

72922

II.1.2) Main CPV code

- 66140000 - Portfolio management services

II.1.3) Type of contract

Services

II.1.4) Short description

The West Yorkshire Combined Authority (the 'Combined Authority') is seeking to appoint a

suitably qualified and experienced consultant/s to provide advice and support in the appraisal

and assurance of scheme project business cases that progress through its local Assurance

Framework.

Consultants seeking to be appointed to this commission will be expected to demonstrate a

breadth of skills and expertise which reflects the broad range of projects that come forward to

the Combined Authority for funding, including transport, housing, regeneration, economic development, and flood resilience. Further information on the variety of schemes can be seen by visiting the Combined Authority website.

II.1.5) Estimated total value

Value excluding VAT: £800,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.3) Place of performance

NUTS codes

- UKE4 - West Yorkshire

II.2.4) Description of the procurement

The appointed consultant will be required to assist in the appraisal of scheme business cases across a range of transport and non-transport Combined Authority funded programmes, such as the West Yorkshire + Transport Fund (WY+TF), Transforming Cities Fund (TCF), City Region Transport Settlement (CRSTS), and the Brownfield Housing Fund (BHF).

The scope of services will include but not limited to the following:

- Undertaking business case appraisal using the HM Treasury Green Book 5 case methodology (Strategic, Economic, Commercial, Financial, Management).
- Review of strategic and local transport models (e.g., using tools such as SATURN, EMME, CUBE Voyager, Aimsun, VISSIM, Transyt, LinSig, Junctions etc.) and economic appraisal (e.g., using tools such as TUBA, COBALT, QUADRO etc.), to ensure these adhere to guidance (e.g., HM Treasury Green Book, DfT TAG, Design Manual for Roads and Bridges, DfT LTN1/20 Cycle Infrastructure Design etc.)
- The Appraisal of Carbon Impact Assessments (CIA) in accordance with the Combined Authority's CIA tool and guidance, comprising a qualitative assessment in Stage 1 and a quantitative assessment in Stage 2 of the Assurance Process.
- The Appraisal of Appraisal Specification Reports (ASR) to determine the agreed appraisal methodology & tools with scheme promoters to assess the economic, environmental, and social impacts of scheme business cases, in accordance with the PMA's ASR Template and guidance for transport and non-transport schemes.
- Review of environmental impacts (e.g. air quality, noise, water environment etc.) of infrastructure schemes, flood risk management schemes etc. following relevant guidance (DMRB, DfT TAG, DEFRA guidance suite etc.)

- Review of economic appraisal models for housing and regeneration schemes including those based on job creation, skills, earnings uplift, Gross Value Added (GVA), and land value uplift (LVU).
- To review the evidence of need (case for investment) and market demand for the proposed scheme alongside business case products such as risk registers, statutory & regulatory approvals, cost plans and viability gaps, and scheme delivery programmes as appropriate to the decision point.
- The Appraisal of Equality Impact Assessments (EqIA) to determine if scheme designs have suitably considered the impact on protected characteristic groups as defined in the Equality Act 2010.
- The Appraisal of Evaluation Plans to determine if scheme business cases have adequately incorporated a Logic Model, Benefits Realisation Strategy, and a post scheme Monitoring & Evaluation Plan to evaluate scheme success.
- The completion of appraisal reports and recommendations to the Programme Appraisal Team panel (PAT) in a format compliant with reporting templates provided by the PMA and to formal agreed timescales.

The appointed consultant will act in a call-off capacity, working to the Combined Authority's PMA team and associated members.

This tender is a single provider framework. Individual commissions will be issued on the basis of individually priced Task Order. For guidance only, these may range in value from approx. £3,000 to £6,000 each but this is dependent on the scope of work required.

The workload will be based on the forward plan of schemes that are due to come forward through the assurance process from September 2023 onwards and is subject to change. This information will be shared with the successful tenderer throughout the contract period.

As a guide, we expect to commission circa 3-4 appraisals per calendar month, typically involving the appraisal of one or more of the five cases of a business case submission. From time to time, the appointed consultant may be required to provide advice and technical support related to appraisal best practice and the interpretation of national scheme appraisal guidance or other such ad-hoc requirements too.

II.2.14) Additional information

The procurement will run for a minimum 2 year period with a +1, +1 year optional extension (so a possible 4 year term). This will be subject to the Forward Plan (pipeline of schemes and funding programmes) and availability of PMA resources.

II.3) Estimated date of publication of contract notice

26 May 2023

Section IV. Procedure

IV.1) Description

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

The procurement is covered by the Government Procurement Agreement: Yes

Section VI. Complementary information

VI.3) Additional information

Please note this PIN is for prior information only and is not a call for competition. Any

subsequent tender documentation in connection to this opportunity will go live on our e-tendering system, YorTender, in due course (<https://yortender.eu-supply.com>). Suppliers are

advised to register on the above tender platform in anticipation of our tender opportunity.