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Planning

Domestic Energy Efficiency Delivery Partner Framework - Warmer Homes Consortium

PORTSMOUTH CITY COUNCIL

F01: Prior information notice

Prior information only

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Section I: Contracting authority

I.1) Name and addresses

PORTSMOUTH CITY COUNCIL

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Portsmouth

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Contact

Procurement Service

Email

procurement@portsmouthcc.gov.uk

Telephone

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Country

United Kingdom

Region code

UKJ31 - Portsmouth

Internet address(es)

Main address

<https://www.portsmouth.gov.uk/services/business/procurement/contract-opportunities-with-us/>

I.3) Communication

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

<https://in-tendhost.co.uk/portsmouthcc.aspx/Home>

Additional information can be obtained from the above-mentioned address

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://in-tendhost.co.uk/portsmouthcc.aspx/Home>

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

Domestic Energy Efficiency Delivery Partner Framework - Warmer Homes Consortium

II.1.2) Main CPV code

- 71541000 - Construction project management services

II.1.3) Type of contract

Services

II.1.4) Short description

Portsmouth City Council - the 'council' - will be undertaking a procurement process over spring / summer 2022 to establish a framework agreement for the delivery of domestic energy efficiency measures.

The council is seeking to work with a primary provider who will manage funds on behalf of the council for the allocation of funding and delivery of energy efficiency works related to funding streams made available by the Department for Business, Energy & Industrial Strategy (BEIS). Such funding streams are likely to include for, but not be limited to, the following schemes:

- Local Authority Delivery (LAD)
- Home Upgrade Grant (HUG)
- Social Housing Decarbonisation Funding (SHDF)
- Warm Homes Funding (WHF).

The broad scope of activities which are envisaged to be covered by the framework agreement is summarised within Section II.2.4 below.

The council leads a group of 21 partner local authorities under the banner of the Warmer Homes Consortium (WHC). WHC membership is open to any Local Authority or Registered Provider located within the South West, South East, London and East of England. The current WHC members are listed within Section II.2.3.

Whilst the framework will be used for delivery of efficiency measures across the geographical areas covered by the participating WHC members, the work will be managed through the council who will be the sole party to the agreement and resulting call off contracts.

The council is targeting award of the framework agreement by August 2022. Once in place the agreement will run for a duration of 4 years. Estimates for spend across the term of the agreement are:

- Direct consideration to framework providers(s): £5M - £20M
- Associated total expenditure of grant monies for energy efficiency works: £50M - £200M

Expenditure via the framework will be dependent upon the securing of future funding and uptake by WHC members. No guarantees can be made in respect of the value estimates stated which may be significantly exceeded should significant additional related funding streams and / or further WHC participation be secured over the term of the agreement.

Whilst the council is seeking to work with a single primary provider, 3-4 overall providers will be appointed onto the framework agreement. The top ranked provider will act as the primary delivery partner provider with call off contracts generally let via direct award with the remaining providers held in contingency in case of any significant performance issues.

In addition the council may also opt to invite all providers to submit mini-competition proposals for project commissions which may require the development of alternative delivery models, access to specialist resources, etc.

The council will run the procurement process to establish the framework agreement in accordance with the Open Procedure as defined within the Public Contracts Regulations (2015) in accordance with the following indicative target programme:

- Issue FTS PIN Notice - 19.04.22.
- Deadline for market testing PIN responses - 06.05.22 12:00
- Issue FTS Contract Notice - 16.05.22
- Tender return deadline - 17.06.22
- Notification of award decision - 11.07.22
- Framework commencement - 1st August 2022

The council has issued a Proof of Concept document via its e-sourcing solution InTend which interested providers are encouraged to access for further information. The InTend system can be accessed free of charge via the following web address:

<https://in-tendhost.co.uk/portsmouthcc.aspx/Home>

Whilst not a compulsory requirement for participation in the forthcoming procurement process, interested providers are encouraged to complete the accompanying soft market testing questionnaire and return it via InTend, ideally by no later than Friday 6th May 2022 12:00.

Any responses returned after this date and time will not be set aside but may not be subject to detailed review by the council prior to issue of the tender pack which is targeted for Monday 16th May 2022.

II.1.5) Estimated total value

Value excluding VAT: £20,000,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 45311000 - Electrical wiring and fitting work
- 45315000 - Electrical installation work of heating and other electrical building-equipment
- 45317000 - Other electrical installation work
- 45321000 - Thermal insulation work
- 45324000 - Plasterboard works
- 45331000 - Heating, ventilation and air-conditioning installation work
- 45332200 - Water plumbing work
- 45333000 - Gas-fitting installation work
- 45350000 - Mechanical installations
- 45410000 - Plastering work

- 45421100 - Installation of doors and windows and related components
- 45422100 - Woodwork
- 45430000 - Floor and wall covering work
- 45440000 - Painting and glazing work
- 45451000 - Decoration work
- 66171000 - Financial consultancy services
- 71240000 - Architectural, engineering and planning services
- 71250000 - Architectural, engineering and surveying services
- 71321200 - Heating-system design services
- 71321300 - Plumbing consultancy services
- 71321400 - Ventilation consultancy services
- 71510000 - Site-investigation services
- 71520000 - Construction supervision services
- 71540000 - Construction management services
- 71630000 - Technical inspection and testing services
- 75112000 - Administrative services for business operations
- 79211000 - Accounting services
- 79340000 - Advertising and marketing services
- 79411100 - Business development consultancy services
- 79412000 - Financial management consultancy services
- 79413000 - Marketing management consultancy services
- 79418000 - Procurement consultancy services
- 79421000 - Project-management services other than for construction work
- 79994000 - Contract administration services
- 79999200 - Invoicing services

II.2.3) Place of performance

NUTS codes

- UKF2 - Leicestershire, Rutland and Northamptonshire
- UKH - East of England
- UKI - London
- UKJ - South East (England)
- UKK - South West (England)

Main site or place of performance

Membership to the Warmer Homes Consortium (WHC) is open to any Local Authority or Registered Provider located within the South West, South East, London and East of England. The current WHC members are as follows:

- Adur and Worthing Councils
- Arun District Council
- Basingstoke and Dean Borough Council
- Brighton and Hove City Council
- Chichester District Council
- Crawley Borough Council
- Croydon Council
- East Hampshire District Council
- Eastleigh Borough Council
- Fareham Borough Council
- Gosport Borough Council
- Havant Borough Council
- Horsham District Council
- Mid Sussex District Council

- New Forest District Council
- Peterborough City Council
- Portsmouth City Council
- Rushmoor Borough Council
- Rutland County Council
- Southampton City Council
- Winchester City Council

The framework will be used for delivery of efficiency measures across the geographical areas covered by current and future participating WHC members.

II.2.4) Description of the procurement

The council has an ambition to deliver domestic energy services to all households in Portsmouth and surrounding area in order to mitigate fuel poverty, reduce energy and carbon use and develop and strengthen a local low-carbon supply chain. This includes the development and enhancement of existing schemes and funding; as well as identifying future opportunities, appropriate service and delivery of projects.

Further details related to the provision of energy support via the Switched On Portsmouth service is available at the below links:

- www.switchedonportsmouth.co.uk
- Portsmouth City Council's Energy at Home Strategy 2020-25 (March, 2020) <https://democracy.portsmouth.gov.uk/documents/s26302/Energy> and Water at Home Strategy report with appendices.pdf
- Portsmouth City Council's Home Energy Support Service (January, 2021) Home Energy Support Service progress update from October.pdf (portsmouth.gov.uk)

In order to realise this ambition, the council wishes to appoint a primary provider with whom they can work in the long term to strengthen the Switched On Portsmouth services, bring in additional resource and provide innovation and opportunities relevant to the council's domestic objectives.

The council currently offers (or has recently offered) a number of schemes, both capital projects and support services that it intends to include within the scope of this framework:

- Capital schemes and values: Warm Homes Funding (£7.4m), LAD 1A (£3.1m), LAD 1B (£14.8m) and Sustainable Warmth (£31.9m)
- Services and funding: Energy Redress Funding, Freephone advice line, home energy support visits, income maximisation services, small energy efficiency measures and broken boiler scheme

The LAD 1A/B projects, currently, are the most successful projects under this funding stream; both in terms of spend and numbers of households having received a measure.

It is the council's intention to work with the primary provider to help to further develop its reputation for delivery with BEIS and other funders. It is intended that this framework will allow the council to build upon their work to date and standing with the partner authorities within the Portsmouth-led Warmer Homes Consortium.

It is envisaged that the primary provider is likely to be a partner that coordinates a list of approved local installers to carry out retrofits associated with grant funding. There will be no requirement for the provider to act as the Principal Contractor. Social value, particularly a commitment to create local jobs in energy retrofit, is an important objective of the council.

The council will require that providers are installer neutral and provide no barriers to local SMEs and residents selecting which installer they would like to carry out works. Providers must also be open to using existing service providers and contractors which participating contracting authorities have compliant arrangements in place with.

The scope of activities that the framework may be used to commission providers to undertake can be summarised as:

Core Requirements:

- Act as the delivery agent for funding such as Local Authority Delivery (LAD), Home Upgrade Grant (HUG), Warm Homes Fund (WHF), and other pots of appropriate funding related to energy retrofit.
- Undertaking delivery of grant funding on behalf of the council; including the liability and conditions of delivery from the contracts signed by the funding recipient with BEIS and other funding bodies.
- Support the council by proactively identifying potential retrofit project opportunities and funding sources for all tenure of domestic properties. Work with the council to develop and achieve their domestic energy priorities.
- Provide expert assistance as required to develop bids and funding proposals to

government and other funders. Work with funders where appropriate to shape funding to meet the needs of the council.

- Where applicable, build and manage the existing Warmer Homes Consortium to achieve programmes of scale.
- Develop and maintain partnerships with local agencies to generate referrals and offer additional support to residents.
- Secure match funding for projects, including the Energy Company Obligation (ECO) funding, as appropriate, aggregating funding from a variety of sources.
- Work with the council to identify suitable targets for specific retrofit activity, based on both the physical characteristics of properties, and the socio-economic status of the households.

o Identify, onboard and coordinate the activity of suitably accredited installers to an approved list, to undertake high quality, holistic retrofit work across the south Hampshire region, and other consortium members' areas. This should include a focus on supporting relevant local contractors where appropriate. This may include technical support given to develop their skills and accreditations in the low carbon retrofit sector; as well as operational support such as short payment terms and transparency, and an effective process for understanding the creation of jobs and apprenticeships.

- Offer additional benefits to fuel poor clients such as energy advice, small energy-saving measures, assistance with income maximisation, and referral to other local advice, support and onto schemes offering larger measures as appropriate.

- Manage fuel poverty programmes for the council where appropriate:

o Provide dedicated project and stakeholder management

o Work with the council to market the programme to residents, landlords, local agencies and potential contractors

o Provide straightforward and accessible channels for households to apply for, and be referred to, these fuel poverty programmes

o Provide end-to-end customer support, including eligibility checking, support for completing application forms, dealing with queries and complaints, onward referral to appropriate agencies, and secure transfer and use of personal data

o Provide appropriate retrofit assessment and coordination capacity to ensure individual properties receive a high quality, futureproof surveys and planning

- o Provide detailed monitoring of and reporting on outputs to the council and Warmer Homes partners, undertake quality assurance and arrange technical monitoring as appropriate to guarantee the delivery of the expected outcomes and ensure that any issues are identified and dealt with

- o Proactively provide monitoring and evaluation of the projects and critical analysis of successes as well as areas of improvement.

Secondary Requirements

- Provide call handling and energy advice as part of a freephone service. The advice line should triage residents' issues and refer them into the wider schemes offered by the Switched On Portsmouth service and other agencies around the city.
- Will work with the council to support the establishment of publicly procured frameworks and/or Dynamic Purchasing Systems (DPS).
- The delivery of domestic water efficiency programmes.
- Delivery of energy surveys and EPCs in non-domestic settings.
- Delivery of services to non-domestic organisations such as SMEs and micro-businesses.
- Identify funded funding opportunities for training local SMEs to enter the domestic energy retrofit workspace.

The council is not primarily seeking an installer, but rather a service provider with experience of working in the domestic energy efficiency sector; with a particular focus on project delivery of grant-funded schemes. The supplier should work with the council to:

- Identify and bid for opportunities in a funding landscape where a lot of money is often released at short notice.
- Manage and maintain an approved list of local installers to carry out works.
- Supply a robust vetting process for the installers.
- Work with installers towards accreditation such as MCS and Trustmark,
- Acting in a retrofit coordinator capacity where appropriate.

The procured framework will also enable other domestic energy support to be called off from the appointed supplier, including:

- Home energy visits
- Income maximisation services
- Provision of small measures to vulnerable homes.

Providers must have a robust process for vetting households in order to ensure their qualification for schemes and support, ability to produce reports and have robust CRM; in order to provide smooth customer journeys and query management.

The council may also work in partnership with providers to establish further, publicly procured frameworks or DPS' for provision of energy efficiency installations such as solar PV and cavity wall insulation amongst others to council-owned domestic properties. Similarly the council may seek to utilise any existing compliant agreements that providers have already established.

The council may also ask the primary provider to provide a freephone service to residents and may work with the service provider to enable water efficiency projects.

II.2.14) Additional information

Whilst the framework agreement will provide an option for the council to directly enter into contracts for energy efficiency works, the significant majority of works arising from this procurement will be in respect of energy efficiency measures delivered directly to private sector residents, who as recipients of grant funding, will be able enter into contract directly with a suitably qualified installation contractor of their choice.

It is the council's position that such private sector works as described above do not fall under the scope of public works as defined within the Public Contracts Regulations (2015) and whilst providers will be able to nominate themselves or other contractors as potential sourcing options to private sector grant recipients for the delivery of works no binding contractual exclusivity will be created.

Where the council, or any of the other current or future Warmer Homes Consortium contracting authority members, contract directly for works this will likely be via existing compliantly procured contracts and / or framework agreements which the contracting authorities are already party to or are able to compliantly access.

However, there may be occasion where the providers appointed via this procurement process may be called upon to establish new compliantly procured contracts, framework agreements or dynamic purchasing systems through which related works which fall under the scope of public works as defined within the Public Contracts Regulations (2015) may be sourced.

Similarly, contracting authorities may also opt to source related public works via any suitable existing sourcing routes which providers may be able to offer and the contracting authorities are able to compliantly access.

II.3) Estimated date of publication of contract notice

16 May 2022

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