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Tender

Framework for Commercial Agency Services

Surrey Heath Borough Council

F02: Contract notice

Notice identifier: 2023/S 000-011704

Procurement identifier (OCID): ocds-h6vhtk-03c3ab

Published 24 April 2023, 4:05pm

Section I: Contracting authority

I.1) Name and addresses

Surrey Heath Borough Council

Surrey Heath House, Knoll Road

Camberley

GU15 3HD

Contact

Vincent Hunt

Email

vincent@vfhuntltd.onmicrosoft.com

Telephone

+44 7970659846

Country

United Kingdom

Region code

UKJ25 - West Surrey

Internet address(es)

Main address

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

I.3) Communication

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

<https://www.delta-esourcing.com/tenders/UK-UK-Camberley:-Property-management-services-of-real-estate-on-a-fee-or-contract-basis./6C7634VEG3>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.delta-esourcing.com>

Tenders or requests to participate must be submitted to 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

Framework for Commercial Agency Services

Reference number

777289126

II.1.2) Main CPV code

- 70330000 - Property management services of real estate on a fee or contract basis

II.1.3) Type of contract

Services

II.1.4) Short description

Surrey Heath Borough Council (SHBC) is currently looking to set up a new multi-agency framework for SHBC investment agency services. Appointed suppliers will support the Council with acquisitions and disposals of property and land.

The agents will be required to assist with the acquisition and disposal of retail, office, leisure, industrial and community assets. There is a further requirement for the agents to review the market for potential acquisition opportunities that may be of interest to the Council and present those for consideration. The Council will consider the assets that meet the following criteria: assist regeneration, promote economic growth, protect employment. There will be 3 lots:-

1.1 Lot 1: Commercial sales and acquisitions

1.2 Lot 2: residential sales and acquisitions

1.3 Lot 3: retail sales and acquisitions

Please note that the Council will be holding a bidder information meeting between the 9th and 12th May 2023.

II.1.5) Estimated total value

Value excluding VAT: £1,400,000

II.1.6) Information about lots

This contract is divided into lots: Yes

Tenders may be submitted for all lots

II.2) Description

II.2.1) Title

1.1 Lot 1: Commercial sales and acquisitions

Lot No

Lot 1

II.2.2) Additional CPV code(s)

- 70332200 - Commercial property management services

II.2.3) Place of performance

NUTS codes

- UKJ25 - West Surrey

Main site or place of performance

West Surrey

II.2.4) Description of the procurement

The Specification of Services to be provided under Lot 1 are set out below:

3.1.1 Overview of Surveying Services Requirements

The Council requires the Framework Provider to be able to provide professional management, advice, guidance, negotiation and assistance on property and estates issues but for all the services on the following list. This list covers the main services required:

Acquisition of freehold and leasehold property

Disposal (includes letting and or commercial arrangements) of freehold and leasehold property

Rent reviews

Lease breaks and lease expires

Lease renewals

Dilapidations

Landlord and Tenant issues including Landlord consents, service charges and claims

Rating support services

Strategic advice including the preparation and development of an estate strategy

Procurement strategy for property related issues.

Development consultancy and advice

Valuations

Planning and Planning Viability Assessments

Condition surveys

General advice on estate and property management

General management duties

Compulsory purchase

Daylighting/ sunlighting/ overshadowing and rights of light

Party wall awards

Wayleaves and easements

Other neighbourly matters

II.2.5) Award criteria

Quality criterion - Name: Quality via method statements / Weighting: 60

Cost criterion - Name: Financial Bid Back / Weighting: 40

II.2.6) Estimated value

Value excluding VAT: £466,000

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

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

Being let on the basis of 2+2 years

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.2.14) Additional information

To respond to this opportunity please click here: <https://www.delta-sourcing.com/respond/6C7634VEG3>

II.2) Description

II.2.1) Title

1.2 Lot 2: residential sales and acquisitions

Lot No

2

II.2.2) Additional CPV code(s)

- 70331000 - Residential property services

II.2.3) Place of performance

NUTS codes

- UKJ25 - West Surrey

Main site or place of performance

West Surrey

II.2.4) Description of the procurement

The Specification of Services to be provided under Lot 2 are set out below:

3.3.1 Disposal of freehold and leasehold property including shared ownership properties – Residential

Where surplus property, space or holdings have been identified and, on receipt of an Order, the Provider will provide an initial report with budget costs, forecast incomes, anticipated outcomes and timings which take into account market conditions and risks, together with a recommendation to achieve the most favourable outcome for the Council.

Following agreement with the Council, the Provider will undertake and manage the marketing and disposal through to a satisfactory conclusion for the Council and will provide a comprehensive final report to support a recommendation, including any need to claw back, with advice on amounts and mechanism.

3.3.2 Acquisition of freehold and leasehold property including shared ownership properties - Residential

Following agreement on a procurement strategy, the Provider will undertake and manage a comprehensive search of available property solutions.

3.3.3 Valuations – Residential

Valuations to the appropriate RICS standards are to be provided by the Provider where necessary in the provision of the Surveying Services outlined above. The Council may require independent standalone valuations which can take a number of forms including:

Full valuations

In accordance with RICS Valuation – Professional Standards March 2012, capital and rental values.

Desk top

Based upon property information provided by the Council, without the need for inspection – capital and rentals values.

Capital Charge

For internal charging purposes. Valuations to be based upon current open market existing use value (EUV); alternative use value (AUV), where that is greater and apportioned between land and buildings, with an assessment of remaining economic life.

Independent ‘check’ valuations

Verification of capital and rental values.

II.2.5) Award criteria

Quality criterion - Name: Method statement scores / Weighting: 60

Cost criterion - Name: Financial bid back score / Weighting: 40

II.2.6) Estimated value

Value excluding VAT: £466,000

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

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

Being let on a 2+2 basis

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

LOT 3 - RETAIL SALES, ACQUISITIONS, VALUATIONS, LETTINGS, MANAGEMENT

Lot No

3

II.2.2) Additional CPV code(s)

- 70332000 - Non-residential property services

II.2.3) Place of performance

NUTS codes

- UKJ25 - West Surrey

Main site or place of performance

West Surrey

II.2.4) Description of the procurement

The Specification of Services to be provided under Lot 3 are set out below:

3.4.1 Disposal of freehold and leasehold property – Retail

Where surplus property, space or holdings have been identified and, on receipt of an Order, the Provider will provide an initial report with budget costs, forecast incomes, anticipated outcomes and timings which take into account market conditions and risks, together with a recommendation to achieve the most favourable outcome for the Council.

Following agreement with the Council, the Provider will undertake and manage the marketing and disposal through to a satisfactory conclusion for the Council and will provide a comprehensive final report to support a recommendation, including any need to claw back, with advice on amounts and mechanism.

3.4.2 Acquisition of freehold and leasehold property - Retail

Following agreement on a procurement strategy, the Provider will undertake and manage a comprehensive search of available property solutions.

3.4.3 Valuations – Retail

Valuations to the appropriate RICS standard are to be provided by the Provider where necessary in the provision of Estates Services outlined above. The Council may require independent standalone valuations which can take a number of forms including:

Full valuations

In accordance with RICS Valuation – Professional Standards March 2012, capital and rental values.

II.2.5) Award criteria

Quality criterion - Name: Method statement scores / Weighting: 60

Cost criterion - Name: Financial Bid Backj / Weighting: 40

II.2.6) Estimated value

Value excluding VAT: £466,000

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

system

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

Being let on a 2+2 basis

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

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

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Open 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

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

7 June 2023

Local time

12:00pm

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

English

IV.2.7) Conditions for opening of tenders

Date

7 June 2023

Local time

12:00pm

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: No

VI.3) Additional information

The contracting authority considers that this contract may be suitable for economic operators that are small or medium enterprises (SMEs). However, any selection of tenderers will be based solely on the criteria set out for the procurement.

For more information about this opportunity, please visit the Delta eSourcing portal at:

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GO Reference: GO-2023424-PRO-22613080

VI.4) Procedures for review

VI.4.1) Review body

Royal Courts of Justice

Strand,

London,

WC2A 2LL

Country

United Kingdom

VI.4.4) Service from which information about the review procedure may be obtained

Royal Courts of Justice

Strand,

London

WC2A 2LL

Country

United Kingdom