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Tender

Provision of Portfolio Management & Appraisal Services Framework

West Yorkshire Combined Authority

F02: Contract notice

Notice identifier: 2023/S 000-020591

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

Published 18 July 2023, 10:09am

Section I: Contracting authority

I.1) Name and addresses

West Yorkshire Combined Authority

Wellington House, 40-50 Wellington Street

Leeds

LS1 2DE

Contact

Lauren Robinson

Email

lauren.robinson@westyorks-ca.gov.uk

Telephone

+44 1132517499

Country

United Kingdom

Region code

UKE4 - West Yorkshire

National registration number

8876556

Internet address(es)

Main address

<https://www.westyorks-ca.gov.uk>

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/app/rfq/rwlenrance_s.asp?PID=66921&B=UK

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

https://uk.eu-supply.com/app/rfq/rwlenrance_s.asp?PID=66921&B=UK

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

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.2.2) Additional CPV code(s)

- 66140000 - Portfolio management services

II.2.3) Place of performance

NUTS codes

- UKE4 - West Yorkshire

II.2.4) Description of the procurement

In March 2014 the Leeds City Region Local Enterprise Partnership (LCR LEP) submitted its Strategic Economic Plan (SEP) to Government. This led to £1 billion growth deal award being made to the Combined Authority.

In 2021 the £1.8bn devolution deal was secured for West Yorkshire. This meant the first Mayor of West Yorkshire was subsequently elected, with Tracy Brabin taking up post in May 2021. The devolution deal and election of the Mayor has enabled us to start to drive up living standards for local communities while tackling the climate emergency and helping to deliver our commitment to become a net zero carbon city region by 2038. Further information on this can be found [here](#).

West Yorkshire Local Assurance Framework

As part of the agreements with Government, the CA must publish an annual local Assurance Framework, setting out how funding is allocated, how schemes are appraised, and how funding decisions are made. A copy is available [here](#).

The Assurance Framework sets out the arrangements that the Combined Authority and the LEP have in place to ensure that public money is managed effectively. It explains how the Combined Authority and the LEP identify, appraise, and evaluate schemes to achieve value for money. The Assurance Framework covers expenditure on programmes and schemes funded by Government or local sources in the Leeds City Region. This includes funding received by the Combined Authority in respect of the Single Investment Fund (SIF) and as the accountable body for the LEP.

The purpose of this Assurance Framework is to ensure that the necessary systems and processes are in place to manage funding effectively, and to ensure the successful delivery of our Strategic Economic Framework (SEF) ambitions¹. Its focus is to ensure that necessary practices and standards are implemented to provide the Government, Combined Authority, the LEP and local partners with assurance that decisions over funding (and the means by which these decisions are implemented) are proper, transparent and deliver value for money.

The Assurance Framework is reviewed and updated on an annual basis. As part of recent updates significant work has been undertaken in the last two years, to embed an improved scheme assurance process. The assurance process (set out below) has three stages;

Stage 1: Assessment and Sequencing,

Stage 2: Scheme Development,

Stage 3: Delivery and Evaluation.

It provides a practical 'step-by-step' framework to aid the development of business cases, to ensure successful delivery and to enable monitoring and evaluation. The assurance process is transparent and proportionate and offers a structured process for appraising, developing, planning, delivering and evaluation that is in line with HM Treasury guidance to deliver best public value.

II.2.5) Award criteria

Price is not the only award criterion and all criteria are stated only in the procurement documents

II.2.6) Estimated value

Value excluding VAT: £800,000

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

The Framework will operate for an initial two (2) year term with two (2) 12-month optional extensions to be applied annually up to a maximum of two (2) years (maximum contract term

of 4 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

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

The procurement is covered by the Government Procurement Agreement: Yes

IV.2) Administrative information

IV.2.1) Previous publication concerning this procedure

Notice number: [2023/S 000-009374](#)

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

Date

17 August 2023

Local time

12:00pm

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: 6 (from the date stated for receipt of tender)

IV.2.7) Conditions for opening of tenders

Date

17 August 2023

Local time

12:00pm

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: No

VI.2) Information about electronic workflows

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

VI.3) Additional information

The contract opportunity is advertised on behalf of and will be available for use by the following - The Combined Authority is running this procurement process on its own behalf and other Contracting Authorities as follows: The Borough Council of Calderdale, The Council of the Borough of Kirklees, The Council of the City of Wakefield Metropolitan District, City of Bradford Metropolitan District Council, Leeds City Council, West Yorkshire Housing Partnership (WYHP) Members and Better Homes Hub (or its equivalent named scheme as developed by the Combined Authority).

VI.4) Procedures for review

VI.4.1) Review body

High Court of England and Wales

London

Country

United Kingdom

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

West Yorkshire Combined Authority

Wellington House, 40-50 Wellington Street

Leeds

LS1 2DE

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