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Tender

## **Retrofit Home (Domestic) Energy Efficiency Works - Managing Agents**

Watford Borough Council  
Three Rivers District Council

F02: Contract notice

Notice identifier: 2022/S 000-028942

Procurement identifier (OCID): ocds-h6vhtk-0375ac

Published 14 October 2022, 10:05am

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

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

Watford Borough Council

Town Hall

WATFORD

wd17 3EX

#### **Contact**

Derek Hatcher

#### **Email**

[derek.hatcher@watford.gov.uk](mailto:derek.hatcher@watford.gov.uk)

#### **Telephone**

+44 1923278370

**Country**

United Kingdom

**Region code**

UKH23 - Hertfordshire

**National registration number**

United Kingdom

**Internet address(es)**

Main address

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

Buyer's address

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

**I.1) Name and addresses**

Three Rivers District Council

Three Rivers House, Northway

Rickmansworth

WD3 1RL

**Contact**

Lisa Cook

**Email**

[derek.hatcher@watford.gov.uk](mailto:derek.hatcher@watford.gov.uk)

**Country**

United Kingdom

**Region code**

UKH23 - Hertfordshire

**Internet address(es)**

Main address

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

**I.2) Information about joint procurement**

The contract involves joint procurement

**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-WATFORD:-Construction-project-management-services./E39854263B>

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/UK-UK-WATFORD:-Construction-project-management-services./E39854263B>

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

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**Section II: Object**

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

**II.1.1) Title**

## Retrofit Home (Domestic) Energy Efficiency Works - Managing Agents

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

- 71541000 - Construction project management services

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

Services

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

Delivery of Domestic Retrofit Projects and Related Services for Council's, Local Authorities and Social Housing Organisations within Hertfordshire and Buckinghamshire. This will be a managing agent service offering a turnkey service for all aspects of the delivery. This will be a Framework Agreement.

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

Value excluding VAT: £50,000,000

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

This contract is divided into lots: Yes

Tenders may be submitted for all lots

Maximum number of lots that may be awarded to one tenderer: 3

## **II.2) Description**

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

Managing Agent for Grant-Funded Domestic Retrofit Schemes

Lot No

1

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

- 71541000 - Construction project management services

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

NUTS codes

- UKH23 - Hertfordshire

Main site or place of performance

Hertfordshire

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

Managing Agent for Grant-Funded Domestic Retrofit Schemes - this includes responsibility for the day-to-day delivery of a domestic retrofit projects such as the Green Homes Grant schemes mentioned above, ensuring all aspects of the services are delivered professionally and to the requirements stated herein, including but not limited to:

- Providing independent project management services to enable a non-affiliated supply chain
- Strategizing to secure, procure, and manage a contractor supply chain, including installers, surveyors (EPC surveyors, Retrofit Assessors etc.)
- Creating a project delivery plan
- Contract and Performance Management
- Provisioning a call centre service to manage customer enquiries and applications
- Establishing and running systems to manage the customer journey end-to-end including eligibility screening, application processing and customer support services (see example of customer journey in Appendix 2)
- Identifying eligible properties and households using building stock and fuel poverty data (data analysis)
- Household engagement, marketing, and recruitment (lead generation)
- Undertaking whole-house surveys, retrofit assessments, and technical solution design (or arranging qualified subcontractors for this purpose).
- Management of the retrofit works (scheduling and delivery)
- Inspections, quality assurances and works approval
- Monitoring and evaluation of projects including complying with any reporting

requirements outlined by the funding body, for example with LAD projects by completing monthly reports in a timely manner to enable their submission to the Department for Business, Energy and Industrial Strategy (BEIS) within agreed deadlines (see typical reporting requirements in Appendix 3)

- Customer satisfaction, installation completion and sign-off
- Complying with GDPR requirements and procedures such as the creation of secure data sharing and storage arrangements for all parties.

#### **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: £50,000,000

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

Duration in months

48

This contract is subject to renewal

No

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

Variants will be accepted: Yes

#### **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**

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[esourcing.com/respond/E39854263B](https://esourcing.com/respond/E39854263B)

## **II.2) Description**

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

Management of Energy Company Obligation (ECO) scheme

Lot No

2

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

- 71314300 - Energy-efficiency consultancy services

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

NUTS codes

- UKH23 - Hertfordshire

Main site or place of performance

Hertfordshire

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

Management of Energy Company Obligation (ECO) scheme – involves the provision of recruitment, marketing, case management and administration services for Energy Company Obligation (ECO) and ECO Flex funding programmes to residents of the Local Authority areas.

The procured service provider will:

- a) Provide a referral route to receive and manage referrals from either; directly from residents, from contractors and or their managing agents. We would expect the service to be accessible by website referrals, a free to call telephone service operating from 09:00 to 17:00, Monday to Friday, alongside other customer communication channels such as email, letter and SMS.
- b) Secure ECO funding via its contracts with obligated utility companies or contractors to support the cost of technically suitable energy efficiency measures in qualifying households.
- c) Respond promptly and professionally to all requests for energy saving services from

residents within the Local Authority areas.

d)Manage a referral scheme to provide ECO funded measures in domestic housing, having undertaken a robust recruitment exercise to identify a suitable installer network. This will involve carrying out: quality; health and safety; technical; regulatory; risk; warranty and financial checks on scheme installers, to ensure, for example, installer compliance with the latest PAS retrofit standards

This list is not exhaustive

#### **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: £1,000,000

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

Duration in months

48

This contract is subject to renewal

No

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

Variants will be accepted: Yes

#### **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**



## Independent Energy Advice Service:

Lot No

3

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

- 72253000 - Helpdesk and support services
- 98513310 - Home-help services
- 71314000 - Energy and related services
- 71314300 - Energy-efficiency consultancy services

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

NUTS codes

- UKH23 - Hertfordshire

Main site or place of performance

Hertfordshire

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

Independent Energy Advice Service: This Lot comprises the provision of energy saving advice and support to residents in defined council areas.

The procured service provider will:

- Provide independent, impartial and up-to-date advice and support to householders in the Local Authority areas to help them save energy and money on their fuel bills, and reduce their carbon footprints through behavioural changes, switching tariffs or undertaking energy efficiency home upgrades.
- Have a free to call telephone service operating from 09:00 to 17:00, Monday to Friday, alongside other customer communication channels such as email, letter and SMS.
- Have a proven commitment to alleviating fuel poverty.
- Have staff experienced in speaking to the most vulnerable residents.
- Where applicable, refer customers to approved energy efficiency grant (or loan)

schemes, including those the Councils are involved in delivering such as the Green Homes Grant LAD scheme and the Energy Company Obligation scheme.

f. Seek to establish and maintain a network of referral routes with partner agencies to be able to offer residents grants, charitable support, and advice.

g. Procure added value and referral networks to other agencies and charitable organisations.

#### **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: £500,000

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

Duration in months

48

This contract is subject to renewal

No

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

Variants will be accepted: Yes

#### **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.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers**

List and brief description of conditions

Please see the Part 1 Section of the tender Documents

#### **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

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## **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

In the case of framework agreements, provide justification for any duration exceeding 4 years:

This will be a 4 year Framework Agreement

#### **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

25 November 2022

Local time

10:00am

**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)

**IV.2.7) Conditions for opening of tenders**

Date

25 November 2022

Local time

10:00am

Place

WATFORD

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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**

This tender is a Framework Agreement open to the following participants

Hertfordshire County Council

Broxbourne Borough Council

Dacorum Borough Council

East Hertfordshire District Council

Hertsmere Borough Council

North Hertfordshire District Council

St Albans City and District Council

Stevenage Borough Council

Three Rivers District Council

Watford Borough Council

Welwyn Hatfield Borough Council

Any registered Social Landlord/ Social Housing provider/ Housing Association for housing stock within Hertfordshire (in whole or part)

Buckinghamshire County Council

Aylesbury Vale District Council

Chiltern District Council

Milton Keynes Council (unitary authority)

South Bucks District Council

Wycombe District Council

Any registered Social Landlord/ Social Housing provider/ Housing Association for housing stock within Buckinghamshire (in whole or part)

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

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GO Reference: GO-20221014-PRO-21154736

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

### **VI.4.1) Review body**

Watford Borough Council

Watford

wd17 3EX

Email

[derek.hatcher@watford.gov.uk](mailto:derek.hatcher@watford.gov.uk)

Country

United Kingdom

Internet address

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