

Winchester City Council

Heating Services – Servicing, Maintenance and Installations Procurement

Tender Evaluation Report

Table of Contents

1	Overview.....	3
1.1	Introduction.....	3
1.2	Contract Overview.....	3
1.3	Report Purpose.....	4
1.4	Procurement Process.....	4
2	Invitation to Tender.....	6
2.2	Submissions & Evaluation.....	8
2.3	Tender Outcome.....	8

1 Overview

1.1 Introduction

- 1.1.1 This report has been prepared by Lumensol to provide Winchester City Council (WCC) with specific details on the procurement of the Heating Services - Servicing, Maintenance and Installations Contract.
- 1.1.2 Lumensol were appointed by WCC to facilitate a Framework call off from the Procure Public Heating Framework 2025, via a mini competition process, for Heating Services, the details of which are included in this report hereafter.

Contracting Authority

- 1.1.3 Winchester City Council (WCC).
- 1.1.4 Of: Colebrook Street, Winchester, SO23 9LJ.

1.2 Contract Overview

- 1.2.1 The Contract scope consists of:
- a) Gas servicing and repairs including other fuel types
 - b) Void gas checks and certification
 - c) Planned and ad hoc boiler replacements.
- 1.2.2 The Contract is being procured under a Framework compliant with the Public Contracts Regulations 2015 using a TAC1 contract with amendments, with clear termination clauses for non-performance aligned to pre-determined KPIs.
- 1.2.3 The Contract will commence on 11/05/26 for a period of up to six years. The Contract is for an initial term of three years with an extension option for a further three years.
- 1.2.4 The estimated value of the Contract is £1.7m per annum.
- 1.2.5 It has been the intention of Lumensol to work with WCC staff throughout this process, and we are grateful for their input. All tender documents at each stage of the procurement process have been signed off by WCC.
- 1.2.6 Evaluation of all Bidders responses at ITT stage were undertaken by WCC staff and moderated by Lumensol.

1.2.7 The WCC project team has, to date, consisted of:

Name	Role in Process
Darren Smith - Building Safety Manager	Assist in the development and approve the term briefs Assist in the development and approve the pricing framework and schedule Assist in the development and approve the KPIs Provide data to support the tender (e.g. policies, property and asset lists) Evaluate the tender in accordance with the stated methodology and criteria Assist in the development and approve the ITT and quality questions Assist in the responses to clarifications
Christopher Irons - Asset & Planned Maintenance Manager	Assist in the development and approve the term briefs Assist in the development and approve the pricing framework and schedule Assist in the development and approve the KPIs Evaluate the tender in accordance with the stated methodology and criteria Assist in the development and approve the ITT and quality questions Assist in the responses to clarifications
Richard Elliott – Procurement Officer	Assist in the development and approve the ITT and Quality questions
Kevin Harlow - Finance	Assist in reviewing the pricing framework and schedule. Assist in reviewing commercial submissions.

1.2.8 The tender documents were reviewed and approved by Darren Smith, Christopher Irons and Richard Elliott.

1.3 Report Purpose

1.3.1 Specifically, this report:

- a) Details the process followed and outcomes of the ITT.

1.3.2 The output of this report will enable WCC to make an informed decision in relation to the award of the Heating Services Contract.

1.4 Procurement Process

1.4.1 WCC elected to procure the Contract via a mini competition procedure, using the Procure Public Heating Framework 2025.

1.4.2 The below outlines the high-level steps taken to date:

- a) Contract scoping
- b) Creation of Tender documents
- c) Creation of ITT documentation

- d) Issue of ITT
- e) ITT period
- f) ITT evaluation
- g) ITT outcome letters & report.

- 1.4.3 The contract notice [2024/S 000-037259](#) for the Heating and Associated Services Framework 2025 was published by Procure Public on 18/11/24, the Framework is valid until 05/01/29.
- 1.4.4 There were 20 suppliers on the Framework, and all were invited to bid for the contract.
- 1.4.5 All documents were made available to the Bidders electronically through the MerCell portal.
- 1.4.6 The ITT was published on 07/01/26 with returns required by 12.00pm on 02/02/26.

2 Invitation to Tender

2.1.1 Quality questions were scored on a scale of 0 – 5 based on the criteria set out below:

Description	Assessment	Score
The response exceeds the required standard in several areas and meets the standard in all others. Demonstrates exceptional understanding, innovation, and added value. Evidence is comprehensive, specific, and compelling. No concerns.	Excellent.	5
The response meets the required standard in all areas. Demonstrates strong understanding with relevant and specific evidence. No concerns.	Good.	4
The response meets minimum required standard. Demonstrates adequate understanding with generic or limited evidence. Minor concerns may exist but are not critical.	Satisfactory.	3
The response partially meets the minimum required standard. Some areas lack detail or relevance. Evidence is incomplete or inconsistent. Minor concerns exist.	Minor Reservations.	2
The response fails to meet the minimum required standard. Major concerns about capability or understanding. Evidence is insufficient or missing.	Serious Reservations. Submissions receiving a '1 will not be considered further	1
No response or information to evaluate, ability is not evidenced.	Fail. Submissions receiving a score of 0 will not be considered further.	0

2.1.2 Submissions receiving a score of 0 or 1 for any question would not be considered further and the Bidder would be excluded from the tender process.

2.1.3 Following individual scoring the quality submissions, LumenSol conducted a moderation meeting to agree a single consensus score (not an average) for each element of each Tender.

2.1.4 The quality questions were as follows:

Question No.	Theme	Question	Marks Available
1	Operational Delivery	<p>Please provide a detailed methodology setting out how you intend to resource and deliver the Gas servicing programme to achieve and maintain 100% compliance, and how you will manage the Gas Repairs element of the contract, in line with the requirements set out in the Term Brief and KPI targets.</p> <p>Please also provide your proposed structure chart with named individuals for both the servicing and maintenance workstreams on two separate A4 sheets. (This will not form part of your word count).</p>	20
2	Health and Safety	<p>Please provide a detailed methodology setting out how you will manage risks in the delivery of the works and manage and respond to incidents which occur whilst delivering the service. The methodology shall include [as a minimum]:-</p> <ul style="list-style-type: none"> • A copy of the Tenderers health and safety policy. (not part of word count) • Copies of a standard site risk assessments carried out on a similar contract. • Training process in place for new staff and existing. • Process of reporting and responding to H&S related issues. 	10
3	Resident Communication	<p>Please detail how you will ensure that the Resident is kept engaged and informed, throughout the delivery of works, taking into consideration WCC's diverse Resident base. Please include the following in your response</p> <p>(a) How you drive Resident Care through your staff recruitment, training and management to ensure Customer service values and behaviours are embedded within your staff and supply chain.</p> <p>(b) How you will identify, manage and respond to service failure issues including details of your approach to resolving complaints, managing escalations and learning from service failure to improve the service in the future;</p>	10
4	Integration & IT	<p>Please detail your approach to delivering the full IT interface requirements as set out in the ICT Term Brief and ICT interface requirements. Please include how you plan to support the service in the first six months to create systems stability and data accuracy.</p> <p>Please append a visual plan of the timeframe for integrating, testing and mobilising the interface requirements. (This will not form part of your word count)</p>	10

Question No.	Theme	Question	Marks Available
5a	Social Value and Environmental	WCC would like to work in collaboration with the Provider to deliver maximum social value for its residents and the wider community throughout this contract. a) Please define how you will undertake engagement with WCC and their residents and other relevant stakeholders to understand and deliver the most beneficial social value projects as detailed in the ITT.	5
5b	Social Value and Environmental	b) Please demonstrate with examples how you will deliver and monitor the contract services in the most sustainable way to include but not limited to; fleet, route planning, sustainable products and waste management.	5
Total Quality			60 marks

2.1.5 Each Bidder's pricing submission was evaluated against that of the lowest priced bid participant using the below formula:

$$Price\ Score = \frac{Lowest\ Bidder's\ Tender\ Total}{Bidder's\ Tender\ Total} \times 40$$

2.2 Submissions & Evaluation

- 2.2.1 There were 20 suppliers on the Heating Services Framework, and all were invited to bid, of these only six contractors submitted tender responses in line with the ITT.
- 2.2.2 Submissions were received electronically through WCC's MerCell portal as per ITT instructions on 02/02/26.
- 2.2.3 Lumensol completed an initial review of the submitted tender documents, specifically the mandatory turnover threshold and the insurance requirements, all submissions met the mandatory criteria.
- 2.2.4 Compliant submissions were received from:
- a) Correct Contract Services Ltd
 - b) Signix Ltd
 - c) Smith & Byford Ltd
 - d) Sureserve Compliance South
 - e) TSG Building Services PLC
 - f) Thermoserv Ltd
- 2.2.5 The qualitative questions of the ITT were evaluated by Darren Smith and Christopher Irons of WCC, each signed a Conflict of Interest form beforehand.

2.3 Tender Outcome

- 2.3.1 The maximum score available is 100, comprised of 60 marks for responses to qualitative proposal and 40 marks for the price submission

2.3.2 The Commercial evaluation and review was undertaken by Lumensol and Kevin Harlow (WCC). In addition, Kevin Harlow undertook Dunn and Bradstreet credit checks to provide further assurance as to the financial stability of the bidders.

2.3.3 During evaluation some commercial clarifications were raised to the bidders.

2.3.4 During moderation four of the six bidders scored 1 or 0 for one of the quality questions. Once this was identified the bidder was excluded from the process and no further quality questions were scored, as per WCC's scoring criteria detailed in section 2.1.1 above.

2.3.5 The following Bidders were excluded from the process at moderation due to scoring 1 for one of the quality questions:

- Correct Contract Services Ltd
- Smith & Byford Ltd
- Thermoserv Ltd
- TSG Building Services PLC

2.3.6 The table below outlines the remaining Bidders and their total scores, in order of rank:

Bidder Name	Quality Score	Price Score	Total Score
Signix Ltd	53.00	39.40	92.40
Sureserve Compliance South	34.00	40.00	74.00

Overall Result

2.3.7 As demonstrated in the table above, Signix Ltd is the recommended preferred bidder for delivery of the contract as they were the highest scoring bidder overall.