

Winchester City Council

Responsive Repairs and Maintenance Procurement

ITT Evaluation Report

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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 Repairs and Maintenance Contract.

1.1.2 Lumensol were appointed by WCC to facilitate a two-stage competitive flexible procedure procurement process on their behalf for Repairs and Maintenance, 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) Repairs
- b) Voids
- c) Contact centre
- d) Planned kitchen and bathroom installs.

1.2.2 The Contract is being procured under the Procurement Act 2023 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 03/08/26 for a period of up to seven years. The Contract is for an initial term of four years with an extension option for a further three years.

1.2.4 The estimated value of the Contract is £7.5m 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 SQ stage and ITT stage were undertaken by WCC staff and resident representatives and moderated by Angela Beekmeyer.

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

Name	Role in Process
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<p>Paul Woodham – Property Service Lead</p>	<p>Assist in the development and approve the term briefs Assist in the development and approve the SQ 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</p>
<p>Adrian Wilgoss – Repairs and Voids Manager</p>	<p>Assist in the development and approve the term briefs Assist in the development and approve the SQ 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</p>
<p>Julie Mahoney – Procurement Manager</p>	<p>Assist in the development and approve the SQ Provided data and forms to support the tender (e.g. policies, property and asset lists)</p>
<p>Richard Elliott – Procurement Officer</p>	<p>Assist in the development and approve the ITT and Quality questions</p>
<p>Preshanta Burbidge – Retrofit Manager</p>	<p>Evaluate the tender in accordance with the stated methodology and criteria</p>
<p>Kevin Harlow - Finance</p>	<p>Assist in reviewing the pricing framework and schedule. Assist in reviewing commercial submissions.</p>

1.2.8 The tender documents were reviewed and approved by Paul Woodham, Adrian Wilgoss, Julie Mahoney and Richard Elliott.

1.3 Report Purpose

1.3.1 Specifically, this report:

- a) Details the process followed and outcomes of the SQ.
- b) 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 Repairs and Maintenance Contract.

1.4 Procurement Process

- 1.4.1 WCC elected to procure the Contract following the Competitive Flexible procedure, utilising the two stages of Selection Questionnaire and Invitation to Tender.
- 1.4.2 The below outlines the high-level steps taken to date:
- a) Contract scoping
 - b) Section 20 leaseholder Notice of Intention
 - c) Creation of Tender documents
 - d) Issue of Contract Notice
 - e) SQ period
 - f) SQ evaluation
 - g) SQ outcome letters & report
 - h) Creation of ITT documentation
 - i) Issue of ITT
 - j) ITT period
 - k) ITT evaluation
 - l) ITT outcome letters & report.
- 1.4.3 The Contract Notice [065543-2025](#) was placed on the Find a Tender Service by WCC on 15/10/25 requesting expressions of interest.
- 1.4.4 The SQ and all Tender documents were available to the market to download electronically on 15/10/25 and responses were received on 13/11/25.
- 1.4.5 At ITT stage, all documents were made available to the Bidders electronically through the MerCell portal.
- 1.4.6 The ITT was published on 09/12/25 with returns required by 12.00pm on 30/01/26.

2 Procurement Specific Questionnaire

- 2.1.1 WCC elected to utilise the Procurement Specific Questionnaire as per the PA 2023, along with nine experience-based questions to test Bidders' technical and professional ability.
- 2.1.2 The Procurement Specific Questionnaire was completed on the Mercell portal and was scored on a pass/fail basis.
- 2.1.3 The experience-based questions were scored on a scale of 0 – 5 with full details of the criteria being included in the SQ Instructions.

2.2 Submissions & Evaluation

- 2.2.1 Submissions were received electronically through Mercell as per SQ instructions on 13/11/25. Nine submissions were received in total.
- 2.2.2 Kelly Kerr of Lumensol completed a review of the online completed Selection Questionnaire, specifically the mandatory quantitative pass/fail criteria. Eight of the nine submitted SQs met the mandatory minimum requirements. One bidder Elite South failed to pass Question 12 - Financial Stability criteria, specifically the turnover threshold, and was therefore not taken forward for evaluation.
- 2.2.3 Compliant submissions were received from:
 - a) Axis
 - b) Cardo South Ltd
 - c) DR Jones Yeovil Ltd
 - d) Gilmartins
 - e) Ian Williams
 - f) Mears
 - g) Novus
 - h) Wates.
- 2.2.4 The experience based qualitative section of the SQ was evaluated by the following WCC staff, each signing a declaration of interest form beforehand.

Question Theme	Evaluator
Technical ability conditions of participation	Paul Woodham and Adrian Wilgoss
Health & Safety – Training	Paul Woodham and Adrian Wilgoss
Health & Safety – Management systems	Paul Woodham and Adrian Wilgoss
Quality Assurance – ISO certification	Paul Woodham and Adrian Wilgoss
Quality Assurance – Contract Management	Paul Woodham and Adrian Wilgoss
Quality Assurance – Resident Expectations	Paul Woodham and Adrian Wilgoss
Quality Assurance – SORs & VFM	Paul Woodham and Adrian Wilgoss
Quality Assurance – Sustainability	Paul Woodham and Adrian Wilgoss
Quality Assurance – Collaborative working	Paul Woodham and Adrian Wilgoss

2.3 Shortlisted Bidders

2.3.1 The maximum score for the evidence-based questions was 100.

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

2.3.3 WCC intended to shortlist the five highest scoring Bidders to progress to ITT. The table below outlines the shortlisted Bidders and their score, in order of rank:

Bidder Name	Score
Cardo	83
Wates	79
Axis	78
Ian Williams	70
Gilmartins	69

2.3.4 The following Bidders were not shortlisted:

Bidder Name	Score
Mears Ltd	67
Novus Ltd	64
D R Jones Yeovil Ltd	37
Elite South Ltd	Not scored

3 Invitation to Tender

3.1.1 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.	1
No response or information to evaluate, ability is not evidenced.	Fail.	0

3.1.2 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.

3.1.3 Following individual scoring the quality submissions, Angela Beekmeyer of Lumensol conducted two moderation meetings to agree a single consensus score (not an average) for each element of each Tender.

3.1.4 The quality questions were as follows:

Question No.	Theme	Question	Marks Available
1a	Operational Delivery	<p>Please provide a detailed methodology setting out how you intend to resource and manage the delivery of the contract in line with the requirements set out in the Term Brief. Please make specific reference to your delivery model for Repairs & Maintenance, Contact Centre, Voids and Planned kitchen and Bathrooms replacements.</p> <p>Please detail the following in your response:</p> <p>a) Where you will be based operationally to understand how you will deliver and resource the contract. How you will attract, develop and retain staff.</p> <p>Additionally, please provide your proposed structure chart including the percentage allocation of each role against each work stream on a separate A3 sheet. (this will not form part of the word count)</p>	8

Question No.	Theme	Question	Marks Available
1b	Operational Delivery	b) How you will meet KPI and service delivery targets. How you will work with WCC to manage the contract and deliver the reporting requirements.	7
1c	Operational Delivery	c) The process of managing post inspections to ensure the quality of works both during delivery and post completion. How you use data to identify trends in quality and service to drive performance.	5
1d	Operational Delivery	d) Where you intend to use sub-contractors to deliver part of the service, please define which trades/workstreams this applies to and how you will select, manage and monitor subcontractor performance and VFM.	5
2	Customer Care	<p>The Winchester district is home to a diverse community, with individuals who may have varying needs, including language support, cultural considerations, and accessibility requirements.</p> <p>Please outline your procedures for working in and around our Tenants homes and how you will incorporate these varying needs to meet the Term brief requirements. Also please outline how will you collect and act on feedback from customers.</p>	10
3	ICT	<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>	5
4	Commercial	Please detail how your commercial team will work with WCC to ensure you drive value for money in the delivery of Responsive Repairs and Voids works efficiently in a timely manner and within budgetary constraints.	5
5	Mobilisation	<p>Please provide a detailed mobilisation structure and implementation plan for this contract, including all activities your organisation will undertake prior to the commencement of the contract.</p> <p>Please address the mobilisation requirements of each workstream separately - R&M, Contact Centre, Voids and Planned Kitchen and Bathroom delivery.</p> <p>Please also provide a detailed mobilisation timeline Gantt chart. (This will not form part of your word count).</p>	5
6a	Social Value and Environmental	<p>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.</p> <p>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.</p>	5

Question No.	Theme	Question	Marks Available
6b	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

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

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

3.2 Submissions & Evaluation

- 3.2.1 All Bidders submitted responses in line with the ITT, except Gilmartins who formally withdrew from the tender on the 30/12/25 due to contractual and TUPE risks.
- 3.2.2 Submissions were received electronically through WCC's Merccell portal as per ITT instructions on 30/01/26.
- 3.2.3 The qualitative questions of the ITT were evaluated by the following WCC staff and nominated Resident and TACT panel member, each signing a declaration of interest form beforehand.

Question No.	Theme	Evaluator
1a	Operational Delivery	Paul Woodham Adrian Wilgoss Preshanta Burbidge
1b	Operational Delivery	Paul Woodham Adrian Wilgoss Preshanta Burbidge
1c	Operational Delivery	Paul Woodham Adrian Wilgoss Preshanta Burbidge
1d	Operational Delivery	Paul Woodham Adrian Wilgoss Preshanta Burbidge
2	Customer Care	David Lewis - Tenant representative Mike Sagar - TACT Board Member
3	ICT	Paul Woodham Adrian Wilgoss Preshanta Burbidge
4	Commercial	Paul Woodham Adrian Wilgoss Preshanta Burbidge

Question No.	Theme	Evaluator
5	Mobilisation	Paul Woodham Adrian Wilgoss Preshanta Burbidge
6a	Social Value and Environmental	Paul Woodham Adrian Wilgoss Preshanta Burbidge
6b	Social Value and Environmental	Paul Woodham Adrian Wilgoss Preshanta Burbidge

3.3 Tender Outcome

- 3.3.1 The maximum score available is 100, comprised of 60 marks for responses to qualitative proposal and 40 marks for the price submission
- 3.3.2 The Commercial evaluation and review was undertaken by Tim Baker (Lumensol) and Kevin Harlow (WCC).
- 3.3.3 During evaluation some commercial clarifications were raised to the bidders. These are included at Appendix 1.
- 3.3.4 The table below outlines the Bidders and their total scores, in order of rank:

Bidder Name	Quality Score	Price Score	Total Score
Wates	50.60	36.48	87.08
Axis	47.00	40.00	87.00
Cardo	48.00	38.71	86.71
Ian Williams	36.40	38.35	74.75

Overall Result

- 3.3.5 As demonstrated in the table above, Wates is the recommended preferred bidder for delivery of the contract.

4 Appendix 1 – Commercial Clarifications

Contractor	Element	Item	Question for Contractor	Response
Cardo	Tab 2.4 Quoted works	Day rates and hourly rates	<p>We have identified an adding error in the spreadsheet in relation to Tab 4.2 Quoted works, where not all the cells were included in the total sum. We have corrected this on the spreadsheet and in doing so this now changes your overall bid as follows :</p> <p>Original - sum for Tab 4.2 £ 2,315.23 and Tender Grand Tender Total £8,875,023.75</p> <p>Revised Calculation - sum for Tab 4.2 £6,481.27 and Tender Grand Total £8,879,189.79</p> <p>Can you confirm that you are happy with this amendment and confirm the above Total Contract price by 5pm 11/02/26.</p>	<p>Further to your messages below, we can confirm that we are happy with the correction to the formula on the Quoted works Tab and that we accept the new tender Value, as per the revised Tender Pricing document.</p>
Cardo	Tab 2.6 Asbestos	Asbestos testing rates	<p>Could you please clarify the following:</p> <p>In relation to Tab 2.6 Asbestos Testing - can you please confirm that the Total unit rate only includes items specified within the contract documents and no additional items or overheads have been allowed for, (other than the central office overhead and profit) which is already included.</p> <p>Can you please respond by 5pm on 11/02/26.</p>	<p>Further to your recent message, we can confirm that we are happy with the Asbestos Rates provided and that these rates re inclusive of Site Overhead, other Central overhead and profit is picked up separate.</p>
Axis	Tab 2.6 Asbestos	Asbestos Management surveys	<p>Can you please confirm the following:</p> <p>In relation to Tab 2.6 Asbestos Management surveys and reinspection - can you please confirm that the Total unit rate only includes items specified within the contract documents and no additional items or overheads (other than the central office overhead) have been allowed for.</p>	<p>We confirm that our rates for Asbestos Management surveys and re-inspections in Tab 2.6 are in accordance with the contract documents and do not include any additional items or overheads.</p>

Contractor	Element	Item	Question for Contractor	Response
Wates	Tab 2.5 Contact Centre	IT set up costs	<p>Could you please clarify the following:</p> <p>In relation to Tab 2.5 Contact Centre costs, line item IT set up costs, is this an annual chargeable cost?</p> <p>Could you please respond by 5pm on 11/02/26.</p>	<p>Good afternoon</p> <p>We can confirm that the IT costs in the Contact Centre is an annual chargeable cost.</p> <p>Regards</p>
Ian Williams	Tab 2.0 Tender Summary	Central Office Overheads	<p>Could you please clarify the following:</p> <p>With regard to the Central Office Overhead in Tab 2.0 - Can you please confirm that this uplift percentage represents the total cost of delivering the contract in line with the tender documentation.</p>	<p>We confirm that Central Office Overhead percentage of 19.23% as entered in Cell D24 on Tab 2 of the Pricing Document, is our uplift percentage to cover our central overhead costs to deliver this contract.</p> <p>We note that this uplift percentage carries through to all pricing tabs and is applied to all prices accordingly.</p>

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