

APPENDIX 4: RESPONSE TO QUALITY EVALUATION CRITERIA

Bidders shall respond to the questions as set out in this document.

Word limits are provided for each question and bidders are required to use Arial Font size 11 format. Responses that exceed the word limit will only be scored up to the word limit point. Any additional documentation provided by Bidders, apart from CV's, will not be scored.

CVs should be submitted on one document only, referencing the corresponding question number.

The total weighting for the Quality submission is **50%**.

Question number	Quality Criteria	Weighting
1.	<p>Skills and Experience</p> <p>Please describe what resources your organisation will utilise to deliver the Council's requirements for this contract opportunity. As a minimum, this should cover:</p> <ol style="list-style-type: none">1. Organisation chart of person(s) involved in the contract.2. Staff roles and responsibilities to deliver this contract.3. Staff experience and qualifications and how these will benefit this contract. Please attach copies of CVs.	15%
<p>The Longshore Real Estate (Longshore) team is structured to deliver the Council's property valuation requirements efficiently and effectively. The organisation chart for this contract includes:</p> <p>Ryan Edwards MRICS – Director</p> <p>Role: Ryan will manage the day-to-day operations of the valuation process. His responsibilities include coordinating the valuation team, reviewing all valuation reports for accuracy and compliance with RICS standards, and providing expert guidance on complex valuation issues.</p> <p>Experience: Ryan is an experienced Charter Surveyor specialising in valuations; he has a strong background with over 15 years' experience. His comprehensive understanding of the property market and valuation standards ensures that all reports are precise and compliant with RICS standards. Ryan's leadership will drive the quality and accuracy of our valuations. Ryan has completed in excess of 500 valuations.</p>		

<p>Davis Malana – Director</p> <p>Role: Davis will oversee the strategic direction of the contract, ensuring that our services align with the Council’s objectives and standards. He will also be responsible for client communication formally at least once a quarter, ensuring transparency and satisfaction throughout the contract period or more frequently as required by the council.</p> <p>Experience: Davis brings over 10 years of experience in real estate, specialising in internal valuations, fund management, asset management, and transactional expertise. His strategic vision and client-focused approach will ensure that the Council’s needs are met effectively and efficiently. Davis has completed in excess of 500 valuations.</p> <p>Jack Pluck - Director</p> <p>Role: Jack will lead the on-site inspections and data collection processes. Ensuring that all valuations are conducted with the highest level of professionalism and accuracy.</p> <p>Experience: Jack has over six years' experience within real estate. Jack has been responsible for the co-ordination of total portfolio value and modelling across 500+ assets. In addition, Jack has four years of experience within accounting including a £300m+ UK joint venture. His attention to detail and expertise will ensure that all valuations are thorough, accurate, and reflective of current market conditions. Jack has assisted in over 500 valuations.</p> <p>Please find attached CVs of key personnel for further details on their qualifications and experience.</p>		
2.	<p>Service Delivery</p> <p>With reference to the specification, please describe how your organisation will deliver the services required under this contract, including lead times, ensuring an appropriate quality of service is provided at all times.</p>	15%
<p>Longshore is committed to delivering high-quality property valuations that meet the Council’s requirements. Our innovative business, combined with the experience of our team, ensure that we provide accurate, timely, and reliable valuation services. Below, we detail our approach to service delivery, including lead times and quality assurance measures.</p> <p>A. Initial Consultation and Scope Definition</p> <p>1. Client Engagement:</p> <ul style="list-style-type: none">○ We begin with an initial consultation to fully understand the Council’s requirements and objectives. This includes defining the scope of work, specific property details, and any unique considerations for each valuation assignment. <p>2. Customised Service Plan:</p> <ul style="list-style-type: none">○ Based on the consultation, we develop a customised service plan that outlines the steps, timelines, and resources required for the project. This plan will be in line with prior undertakings with Council. <p>B. Data Collection and Market Analysis</p> <p>1. Site Inspection:</p>		

- Our team conducts thorough on-site inspections to gather detailed information about the properties. This includes assessing the physical condition, location, and any unique features that may impact value, in accordance with the specifications.

2. Market Research:

- We utilise advanced data analytics to conduct comprehensive market analyses. This involves collecting data from various sources, including public records, market reports, and proprietary databases.

3. Data Integration:

- The collected data is integrated into our proprietary valuation model, which provides benchmarking and supports the accuracy of our valuations.

C. Valuation Process

1. Valuation Model Development:

- Using the integrated data, our team develops detailed valuation models. These models are continually refined and benchmarked at least quarterly and validated against market trends to ensure their accuracy.

2. Report Preparation:

- We prepare detailed valuation reports that include a thorough analysis of the property, the methodology used, and our valuation findings. These reports are designed to be clear, concise, and actionable, meeting all requirements specified by the Council. Reports will be submitted in a PDF electronic format

The following valuation services can be provided by Longshore in line with broader process adjusted accordingly to the required valuation type.

1. Red Book Valuations for Right to Buy Scheme

- **Measured Surveys & Plans:** Conduct detailed surveys in compliance with RICS standards, including accurate boundary, easement, and access rights identification.
- **Valuation Report:** Provide open market valuations, disregarding tenant improvements, within 10 business days (7 days in urgent cases).

2. Compulsory Purchase & Compensation Valuations

- **Valuation & Strategic Advice:** Offer precise valuations and strategic advice on CPO-related transactions, ensuring compliance with legal standards.

3. Lease Extension Valuations

- **Premium Calculation:** Accurately calculate lease extension premiums in line with the Leasehold Reform Act, assisting with regulatory compliance and notice serving.

4. Strategic Advice on Collective Enfranchisement & Property Matters

- **Consultancy:** Provide tailored strategic advice on collective enfranchisement, land acquisitions, and disposals based on our thorough market analysis.

5. Open Market Valuations for Rental Income & Property

- **Market Rate Valuations:** Perform Red Book valuations to determine open market rental income and property values, based on detailed market research.

6. Staircasing Valuations for Shared Ownership

- Ready to deliver Red Book valuations for staircasing in shared ownership schemes if required.

7. Buy Back Valuations

- **Valuation Range:** Provide a valuation range for property acquisitions under the Right of First Refusal, aiding in negotiation strategies.

8. Housing Land Valuations

- **Land Market Valuations:** Conduct Red Book valuations for residential land disposals and Garden Licence rental income, considering zoning and market factors.

Lead Times

Longshore is committed to delivering valuations within the stipulated timeframes. Our standard lead times for residential property valuations are as follows:

1. Initial Consultation and Scope Definition:

- Within 1-2 business days

2. Site Inspection:

- Within three business days from approval of the service plan

3. Data Collection and Market Analysis:

- Within two business days

4. Valuation Model Development:

- Within two business days

5. Report Preparation and Quality Assurance:

- Within three business days

Total Lead Time:

- **10-15 business days** from the initial consultation to the delivery of the final valuation report. We can expedite this process if required, depending on the urgency and complexity of the assignment.

Our suggested turnaround time is typically **10 business days**, well within the required 15 business days as specified. In exceptional circumstances, we can complete the valuations in **7 business days**.

The first batch of valuations will be ready to commence on **1 October 2024**, ensuring that we can immediately start delivering our services to the Council.

<div><div><div>Quality Assurance</div><div>Ensuring the highest quality of service is a core principle at Longshore. Our quality assurance process includes:</div><div><div>1. Experienced Team:</div><div><div>Our team consists of highly qualified professionals with extensive experience in property valuations with a combined 30 years experience.</div></div></div><div><div>2. Continuous Professional Development:</div><div><div>We prioritise continuous training and development for our staff to keep them updated with the latest industry practices and regulatory requirements.</div></div></div><div><div>3. Rigorous Review Process:</div><div><div>Every valuation report undergoes a rigorous review process. At least two members of staff will review and verify the accuracy and compliance of each report with RICS and International Valuation Standards (IVS).</div></div></div><div><div>4. Technology Integration:</div><div><div>We leverage advanced technology to enhance the precision and efficiency of our valuations. Our proprietary valuation model undergoes regular updates and maintenance to ensure optimal performance.</div></div></div><div><div>5. Client Feedback Loop:</div><div><div>We actively seek feedback from the Council to continuously improve our services. This feedback loop ensures that we address any concerns promptly and make necessary adjustments to meet the Council's expectations.</div></div></div><div><div>Adhering to RICS Red Book Standards:</div><div>Ensuring all valuations meet the professional and ethical standards as required.</div></div><div><div>Comprehensive Reporting:</div><div>Providing detailed, clear, and actionable reports that include all required elements such as property descriptions, market analyses, and valuation methodologies.</div></div><div><div>Timely Delivery:</div><div>Meeting and exceeding the specified lead times, with the ability to expedite services in urgent situations.</div></div><div><div>Quality Assurance:</div><div>Implementing a multi-layered quality assurance process to ensure accuracy and reliability in all valuation reports.</div></div><div><div>Technology Utilisation:</div><div>Employing advanced technological tools to enhance data accuracy and operational efficiency.</div></div></div></div>		
3.	<div><div>Performance Management</div><div>Please provide a detailed implementation plan for meeting the performance criteria stated in the specification.</div></div>	14%

Longshore is dedicated to delivering high-quality, accurate, and timely residential property valuations for the Council. Our implementation plan ensures that we exceed the performance criteria outlined. By committing to start the first batch of valuations on 1 October 2024 and ensuring a typical turnaround time of 10 business days, with the flexibility to complete urgent assignments in 7 business days.

Implementation Plan

A. Initial Planning and Preparation

1. Kick-Off Meeting:

- We will begin with a kick-off meeting with the Council to clarify expectations, define the scope, and establish communication protocols. This meeting will ensure alignment on objectives.

2. Resource Allocation:

- Based on the requirements, we will allocate a dedicated team to the project. This team will be led by a Project Director responsible for overseeing the project and ensuring all performance criteria are met particularly the quality of the project team and accountability of timelines.

3. Customised Service Plan:

- We will develop a customised service plan that includes a detailed timeline, milestones, and deliverables. This plan will consider streamlining resources for example timetabling inspection routes whilst ensuring all individual report timelines are met.

B. Performance Criteria and Metrics

1. Timeliness:

- **Lead Times:** We will adhere to beating the lead times specified in the Council's requirements, with a typical turnaround time of 10 business days and the capability to expedite to 7 business days in exceptional circumstances.
- **First Batch Commencement:** The first batch of valuations will be ready to commence on 1 October 2024.

2. Quality of Service:

- **Accuracy:** We will ensure the accuracy of our valuations by employing rigorous data collection and analysis methods, as well as leveraging advanced technology and proprietary software.
- Through our benchmarking exercise it is estimated all valuation will sit within a +/-10% variance of a District Valuer determination.
- **Compliance:** All valuations will comply with the RICS Red Book Standards and International Valuation Standards (IVS).
- All representatives will undergo rigorous checks and training that emphasises professional conduct particularly for all those that go onsite for inspections.

3. Reporting:

- **Clarity and Detail:** Our reports will be clear, concise, and comprehensive, including all required elements such as property descriptions, market analyses, and valuation methodologies.
- **Feedback Integration:** We will establish a feedback loop with the Council to continuously improve our services and address any concerns promptly.

C. Quality Assurance

1. Rigorous Review Process:

- Every valuation report undergoes a rigorous review process. At least two members of staff will review and verify the accuracy and compliance of each report with RICS and International Valuation Standards (IVS).

D. Communication and Reporting

1. Regular Updates:

- We will provide regular updates to the Council on the progress of the valuations. This includes bi-weekly meetings to discuss any issues or adjustments needed.

2. Performance Monitoring:

- We will implement a performance monitoring system to track our adherence to the agreed timelines and quality standards. This system includes key performance indicators (KPIs) such as turnaround time, report accuracy, and client satisfaction.

3. Issue Resolution:

- Any issues or delays will be promptly addressed through our issue resolution process. This includes identifying the root cause, implementing corrective actions, and communicating the resolution to the Council.

E. Continuous Improvement

1. Client Feedback Loop:

- We actively seek feedback from the Council to continuously improve our services. This feedback loop ensures that we address any concerns promptly and make necessary adjustments to meet the Council's expectations.

2. Performance Reviews:

- We will conduct at a minimum quarterly performance reviews to evaluate our adherence to the performance criteria and identify areas for improvement. These reviews will be shared with the Council to ensure transparency and accountability.

3. Innovation and Adaptation:

- We are committed to innovation and continuously seek ways to improve our processes and methodologies. This includes adopting new technologies, for example refining our valuation models or using new software, and

implementing best practices in the industry through our various peer networking events.		
4.	Social Value The Council is fully committed to implementing the aims of the Social Value Act 2012 and through this procurement, how the economic, social and environmental wellbeing of Thurrock Council could be improved both during the process and on an ongoing basis. The Council's Social Value Framework can be viewed here: <u>Thurrock Council Social Value Framework</u> . Please describe your approach to delivering community benefits under this contract, including examples of your achievements under projects of a similar nature. Please also provide a plan of your proposed commitments under this contract.	6%
<p><i>Insert response here (maximum 600 words).</i></p> <p>Longshore is dedicated to enhancing the economic, social, and environmental wellbeing of the communities we serve. We fully support and are committed to aligning our efforts with Thurrock Council. Our approach to delivering community benefits under this contract is multifaceted, focusing on sustainable economic growth, social inclusivity, and environmental stewardship.</p> <p>In the case of successful award of this contact.</p> <ul style="list-style-type: none"> • We commit to providing work experience to at least one local resident from Thurrock over the course of this contract, providing them with on-the-job training and professional development opportunities in property valuation and management. • Our team will volunteer a minimum of 10 hours annually to support local community projects to address housing concerns in Thurrock. This will include participating in local housing forums to share our expertise and help shape housing policies that benefit the Thurrock community. • We will participate in and sponsor local environmental initiatives that embrace our ethos of green space such as The Friends of Hardie Park with staff volunteer days. • We also commit to sourcing survey equipment and professional services from Thurrock-based businesses. <p>Being a new innovative property consultancy we look to embrace new ways of working including the use of digital tools in the surveying process, cloud based computing and committing to the use of efficient vehicles for site visits. Current employees live in the eastern boroughs of London as such this will minimise travel times and travel emissions.</p> <p>The team at Longshore have been involved in a number of community events in the past including: Land aid sleep outs, Charity run events, Cycling fund raisers and also mentorship programmes for those from disadvantaged backgrounds.</p>		

