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William Sutton Homes – Planned Investment Programme

Background & Context

William Sutton Homes selected 4i Solutions via competitive process, to provide support in respect of their Planned Investment Programme covering some 25,000 homes located throughout the Country.

Key strategic objectives included driving high levels of involvement and participation from Residents, Board, Staff and Group Procurement.

William Sutton also required that an in-built contingency be provided through the agreed Procurement Strategy and subsequent OJEU process, to allow services and collaborative working to develop over time.

Spend for the Planned Investment Programme is expected to reach £100m over a 10 year period.

Services & Support Provided

- Stakeholder involvement and participation through a comprehensive “Hearts & Minds” approach, involving Residents, Board, Staff and existing service providers
- Development of a bespoke Procurement Strategy to support William Sutton’s specific needs
- OJEU compliant procurement, using a restricted route supported by a number of regional Lots
- Mobilisation services including start-up workshop at the NEC in Birmingham
- Development of a bespoke Project Partnering Contract PPC 200
- Ongoing Partnering Advisor support
- Cost Management for year one, including implementation of a bespoke pricing model to support the programme, open book auditing and secure storage of data via Box.net
- Development of a Value for Money Strategy and measurement approach.



Feedback from Hearts & Minds Workshop held at NEC, Birmingham

“ Thanked Nick and team for the day, found it very informative and learnt a lot!. Believe that tenants will take a more active role as a result of the day. Now looking forward to my involvement on the steering group...”

Peter Dutton, Secretary of Residents Association

Examples of Completed Tasks

The Hearts & Minds process outlined overleaf was used to support the OJEU methodology with examples including:



- Development and mutual agreement of four strategic objectives to support the project, covering People, Governance, Performance Management and Finance
- Set up and facilitation of multi-stakeholder Steering Group to oversee the project
- Creation of a detailed Risk Management Framework and Risk Register, covering risk identification, analysis and response
- Detailed debate and development of bespoke a Procurement Strategy to meet William Sutton Homes needs for their Planned Investment Programme
- Collaborative development of OJEU compliant Contract Notice, Pre Qualification Questionnaire (PQQ), Invitation to Tender (ITT) and Assessment Processes
- Provision of a Mid-Tender Briefing
- Delivery of four separate Evaluation Workshops to cover each of the Lots across the Country
- Stakeholder development of Specifications, Pricing Model, Key Performance Indicators (KPIs) and Contract Documentation
- Delivery of a Participative Workshop as a start-off point for mobilisation, attended by approximately 50 stakeholders including Residents, Board, Staff, three newly appointed Construction Partners and key supply chain representatives
- Development of a bespoke Communications Strategy & Plan to support mobilisation and ongoing delivery
- Agreement of Target Costs and detailed Schedules of Inclusion
- Development of a Five Stage Open Book Audit Process to support delivery of robust cost management principles for the Planned Investment Programme
- Creation of a Value for Money Strategy and measurement process
- Contribution to Community Development Initiatives covering local labour, training and refurbishment of a Community Centre
- Establishment of a Strategic Core Group and Regional Commercial Groups to drive delivery