

Annex 2

Evaluation Criteria and tender questions

1 Tenders will be evaluated on some or all of the criteria listed below:

1.1 Quality - 70%

1.2 Price - 30%

The Quality sub-criteria (out of 70% respectively) are as below:

	Tender Questions - description	Score %
0	Suppliers information A – Confirm supplier turnover exceeds £80,000 per annum B – Confirm all products and services (Items 1 – 5 of the Form of Tender) will be provided C – Provide two housing association client references who may be contacted in writing by Victory and must confirm in writing that all the products and services requested are currently being provided or have been provided within the past 5 years	PASS or FAIL (no score) PASS or FAIL (no score) PASS or FAIL (no score)

	Tender Questions - description	Score %
0	<p>Suppliers information (continued)</p> <p>D – Provide confirmation that the product has been implemented to no less than 3 clients and provide the list of clients including the name of a person who may be contacted in writing by Victory and must confirm in writing that all the products and services requested have been implemented</p> <p>E - Provide confirmation that the number of housing units for each of the above references is no less than 2000</p>	<p>PASS or FAIL (no score)</p> <p>PASS or FAIL (no score)</p>
1	<p>Resourcing</p> <p>A - Curriculum Vitae</p> <p>B - Delivery structure & supply chain</p> <p>C - Roles & Responsibilities</p> <p>D - Added value from team members</p> <p>E - Supply chain selection</p>	<p>[2]</p> <p>[1]</p> <p>[1]</p> <p>[1]</p> <p>[1]</p>

	Tender Questions - description	Score %
2	<p>Product presentation document</p> <p>A – Navigation</p> <p>B – Customer Alerts</p> <p>C – View/ update key information & documents</p> <p>D – Customer upload tool</p> <p>E – Printable rent statements</p> <p>F – User configurable forms</p> <p>G – Email alerts to customer</p> <p>H – Event notification & invitations</p> <p>I – Audit tool</p> <p>J – Registration</p> <p>K – Branding opportunity</p> <p>L – Compatibility with existing Housing Management System</p>	<p>[2]</p> <p>[2]</p> <p>[2]</p> <p>[2]</p> <p>[2]</p> <p>[2]</p> <p>[2]</p> <p>[2]</p> <p>[2]</p> <p>[2]</p> <p>[2]</p> <p>[2]</p>
3	<p>Value for Money</p> <p>A - VfM and Quality / Cost balance</p> <p>B - Return on Investment</p>	<p>[1]</p> <p>[1]</p>
4	<p>User Satisfaction</p> <p>A – Proven reliability</p> <p>B – Security</p> <p>C – Simultaneous user / customer service advisor screen view</p> <p>D – Administration tools</p> <p>E - Test</p>	<p>[2]</p> <p>[2]</p> <p>[2]</p> <p>[2]</p> <p>[2]</p>

	Tender Questions - description	Score %
5	Continuous Improvement A - Feedback capture and sharing / learning transfer B – Reporting tools C – Support	 [2] [2] [2]
6	Innovation A - Shift to self-service B – Device & browser compatibility	 [1] [1]
7	Social Value A – Apprenticeships/ Trainees B – Employment and skills plan C – Small Medium Enterprises D – Local supply	 [1] [1] For information For information
8	Sustainability A - Measures	 [2]
9	Delivery method statement A - Contract delivery – implementation & support B - Communication C - Quality Control; product testing	 [2] [2] [2]

	Tender Questions - description	Score %
10	<p>Business Continuity</p> <p>A - Business continuity plan</p> <p>B – Hosting service</p>	<p>[2]</p> <p>[2]</p>
11	<p>Equality and Diversity</p> <p>A - Understanding and Dealing with Equality including accessibility</p>	[2]
12	<p>Risk management</p> <p>A - Risk and response strategy for Data Protection</p>	[2]
13	<p>Client references</p> <p>A - References - details of two housing association client references that can be contacted directly, to provide confirmation of the capability of the organisation in relation to similar product and service delivery carried out previously, to include: Organisation Address, Contact Name & Position, Tel. /Fax Nos. & email address, contract(s) undertaken including contract commencement and completion date(s).</p>	[2]
	Total score	[70] %

1.3 With specific reference to Question 0, a FAIL against any of 0A or 0B or 0C or 0D or 0E will result in Victory rejecting the tender and any further evaluation of the tender will not be carried out.

1.4 The scoring guide for the Tender Action Points (except 13A) will be in accordance with the scoring bands listed below. 13A will be scored by the referee in accordance with the pro forma included.

SCORING BANDS	Quality of response
0	<p>Very Poor: the response is significantly below what would be expected because of one or all of the following: The response indicates a significant lack of understanding relating to the requirements The response fails to meet the requirement Response provides no proposals.</p>
¼ OF THE AVAILABLE MARKS	<p>Poor (meets some of the requirement) The response meets elements of the requirement but gives concern in a number of significant areas. There are reservations because of one or all of the following: There is at least one significant issue needing considerable attention. Proposals do not demonstrate competence or understanding The response is light and unconvincing.</p>
½ OF THE AVAILABLE MARKS	<p>Satisfactory (meets most of the requirement) The response meets most of the requirement but there is at least one significant issue of concern, or several smaller issues. These would require some further clarification and may arise through lack of demonstrated capability and/or appropriate evidence. The response therefore shows: Basic understanding of the requirements Sufficient competence demonstrated through relevant evidence Some areas of concern that require attention. Some proposals but not clear how they would be provided.</p>

<p>³/₄ OF THE AVAILABLE MARKS</p>	<p>Good (meets the requirement) The response broadly meets what is expected for the criteria. There are no significant areas of concern, although there may be limited minor issues that need further exploration. The response therefore shows: Good understanding of the requirements Sufficient competence demonstrated through relevant evidence Some insight demonstrated into the relevant issues. A number of proposals that are clear and deliverable.</p>
<p>FULL MARKS</p>	<p>Excellent (exceeds the requirement). The response exceeds what is expected for the criteria. Leaves no doubt as to the capability and commitment to deliver what is required. The response therefore shows: Very good understanding of the requirements Excellent proposals demonstrated through relevant evidence Considerable insight into the relevant issues. The response is also likely to propose additional value in several respects above that expected.</p>

1.5 Price score: The tender submission will be awarded scores in accordance with the matrix below. Failure to complete any part of the Price List will result in Tenders being rejected.

Reference	Item	Available points
<p>Annex 4 Price List</p>	<p>Numbers 1+2+3+4+5: A – Total Price. B – Suppliers Total Price with lowest Total Price. B divided by A times Available points</p>	<p>24</p>

Annex 4 Price List	Number 6 (Hourly Rate for additional services): A – Hourly rate B – Suppliers Hourly rate with lowest Hourly rate. B divided by A times Available points	2
Annex 4 Price List	Number 7 (Day Rate for additional services): A – Day rate B – Suppliers Day rate with lowest Day rate. B divided by A times Available points	2
Annex 4 Price List	Number 8 (Licence Rate for additional 100 licences): A – Licence rate B – Suppliers Licence rate with lowest Licence rate. B divided by A times Available points	2

- 1.6 The evaluation of costs is marked out of 30.
- 1.7 Any abnormally low offers are addressed in accordance with the Public Contracts Regulations 2015.
- 1.8 The tendered rates shall be deemed to include for all uplift percentages during the term of the contract and any third party Licence Fees (e.g. for computer software) and all expenses required to complete the product and service delivery.

Tender Questions

Introduction

The evaluation criteria and quality sub criteria are set out in section 1 of the Evaluation Criteria. The following questions have been developed by Victory Housing Trust (Victory). Please ensure your responses directly address the requirements of Victory.

Instructions for the completion of this questionnaire

Victory is aware of the resource requirements to prepare a Tender submission such as this and we are appreciative of the commitment made to provide the information.

Please keep your response to a maximum of **one** A4 page per sub-question of each Tender Question unless stated otherwise (see below). Any answers that exceed the maximum page count will only have the information on the first two pages scored.

Tenderers may include appendices with their responses and these will not count towards the word limit. However all appendices must be provided to clarify the answer given in the response to the Tender question and not to provide new information.

There are 14 questions, 0 – 13 inclusive, including a number of specified sub-questions. All sub-questions and requests for information have been numbered throughout the document and you are asked to respond to each of them individually. We accept that there may be some duplication, but we hope to have kept this to a minimum.

Please submit your responses in one number hard copy and one number electronic copy on a CD or USB memory stick, identifying your responses by the numbering in the tender documents. Please ensure that your company name / logo appears on each sheet of your submission and number each page out of the total number of pages.

Please use a font size no smaller than 11 and minimum line/ row spacing one and a half times the font size. Documents with font size and row/line spacing smaller than this will be discarded.-

Victory reserve the right to request additional information which may be required as a result of the answers and information provided in the tender. The evaluation of the Tender Questions will form an important part of the award process.

If you require any further information please contact Mark Turner at the following e-mail address: mark.turner@victoryhousing.co.uk

Tender Questions

1 Resourcing

- (a) Please append CV's for your staff proposed for service delivery demonstrating suitable skills and experience.
- (b) Please explain how your proposed delivery team, including supply chain, will be structured (accountable person leading and operational support).
- (c) Please explain the roles and responsibilities of each person.
- (d) Detail any added value the team members will bring.
- (e) Please detail what your processes are to select subcontractors/suppliers.

2 Product presentation document

Please append a presentation document, e.g. Powerpoint presentation or word or .pdf file, that demonstrates meeting our requirements set out in the briefing document for the following key functionality for your proposed software product:

- (a) Navigation – simple to use and intuitive, making user journeys fast and clear
- (b) Customer alerts – example of how this may appear following customer login, e.g. for rent arrears or an overdue gas service

- (c) Viewing and updating/ validating key information by customers of – household data; contact details; communication preferences; property documentation; repairs logged and history; contact management system history. All subject to a configurable approval mechanism whereby Victory can set what type of changes can be made ‘on the fly’ and what changes require Victory validation and approval.
- (d) Customer upload tool – e.g. pictures and documents
- (e) Printable rent statements – view and print including mini-statements, rent transaction history from Housing Management System and other accounts details such as current balance, service charges etc.
- (f) User configurable forms – online e.g. complaint, end of tenancy, permission request
- (g) Email alerts to customer – forms and information uploaded to customer account send alert email to the customer with direct link
- (h) Event notification and invitations – publish events and create both open and customer specific invitations and facility for acceptance
- (i) Audit tool – to record and enable reporting on customer actions, e.g. documents and pages viewed
- (j) Registration – facility for new customers e.g. prospective tenants to register and complete eligibility forms and submit documents
- (k) Branding opportunity – logo, customisation and consistency with other Victory publications and services.

- (l) Compatibility of your product with the Civica Housing Management Systems (Universal Housing and Contact Manager systems (version 2012 on) in order to enable the fluent and automated exchange of relevant data between the portal and the Civica Housing Management Systems, with the options to transfer data in batch, scheduled and real-time modes as appropriate.

3 Value for Money

- (a) How will you ensure that your portal product delivers outstanding value for money and balances quality against cost to achieve Victory Housing Trust's and its residents goals? Provide an example.
- (b) Give an example of how your organisation can help Victory achieve the best possible Return on Investment.

4 End user satisfaction (Victory residents and staff)

- (a) Proven reliability – demonstrate how minimum 99.75% portal availability will be achieved
- (b) Security – explain how simple user registration and password changes will be delivered, and secure areas will be created and managed securely, including role based access control hierarchy, timeout/ auto logout function and self-service password management.

- (c) Simultaneous user / customer service advisor view – explain how this functionality works to allow staff to assist users having difficulty or to facilitate two way discussion
- (d) Administration tools – explain how the victory administrator is able to change access rights, add new users, access and modify forms etc.
- (e) In addition to the live Tenant Portal website Victory also require a test Tenant Portal website, and a Live to Test copy process, for testing and proving changes prior to implementation on the live Tenant Portal.

5 Continuous Improvement

- (a) How should user feedback be captured and how can this be shared to the benefit of Victory and its residents? Detail how the personnel relevant to this contract take positive steps to transfer any learning with an example outcome for the client.
- (b) Describe how your product facilitates reporting and visit/journey analytics to enable Victory to continuously deliver service productivity improvements.
- (c) Describe how your support provision will ensure expedient troubleshooting and maintain user confidence across the service window (typically 06:00 – 00:00 every day)

6 Innovation

- (a) Shift to self-service – describe how your product has transformed previous clients residents interactions online to deliver both improved resident engagement and improved efficiency.
- (b) Device and browser compatibility – confirm common device types (which must include tablets and smartphones) and browsers with which your portal is fully compatible.

7 Social Value

The Public Services (Social Value) Act 2012 requires Victory to enshrine social value principles in its procurement activities.

- a) Please provide details of any apprenticeship or trainee, e.g. graduate, schemes within your organisation and any positive outcomes arising.
- b) Please provide an Employment and skills plan detailing how the organisation supports the creation of employment opportunities, delivers employment training and benefits the local economy.
- c) Provide details of Small Medium Enterprises (SME's) whom your organisation uses in its supply chain (for information only).
- d) Provide details of organisations with a head office base in Norfolk whom your organisation uses in its supply chain (for information only).

Note the same organisation details may be provided for both c) and d) if applicable.

8 Sustainability

- a) Please provide details of any sustainability improvements your clients have benefited from consequent of a portal implementation.

9 Delivery method statement

- a) Tenderers are required to provide a method statement for the carrying out of the required implementation for Victory in accordance with the Client's Brief and other tender documents and at the tendered price.
- b) How you will manage communication between stakeholders during the service implementation delivery. Detail how you will facilitate seamless communication with Victory taking into consideration the key Victory internal client (Business Support Team).
- c) How you will manage and control quality and test the product during implementation to ensure fitness for purpose prior to launch.

10 Business continuity

- (a) Please provide details of your business continuity plan to deal with unforeseen resource issues e.g. staff sickness, office outage (e.g. due to disaster such as flood or fire) or supply chain failure.
- (b) Please provide details of the proposal for data hosting, the arrangements prevent data loss and the recovery process timeline.

11 Equality and Diversity

The Equality Act 2010 is the law which bans unfair treatment and helps achieve equal opportunities in the workplace and in wider society.

- a) Please explain your understanding of what Equality means in terms of this tenant portal service provision and how accessibility will be fairly assured.

12 Risk Management

- a) Data Protection is a key risk issue for Victory identified in the context of this service provision; please provide a response strategy to deal with prevention of loss of resident data.

13 Client Reference

- a) Reference; details of two client references that can be contacted directly, to provide confirmation of the capability of the organisation in relation to similar service provision and implementation carried out previously, to include: Organisation Address, Contact Name & Position, contact telephone numbers and email address, implementation commencement and completion dates. Victory will take up the references as part of the tender evaluation. If the referee fails to respond to Victory's request within 5 working days the tenderer will be notified and given the opportunity to chase for response within a further 3 working days.

For the reference response, in accordance with the form overleaf, marks will be awarded as follows:

1/4 marks out of maximum for a total score of 6 - 11

1/2 marks out of a maximum for a total score of 12 -17

3/4 marks out of a maximum for a total score of 18 - 23

Full marks out of a maximum for a total score of 24

Reference form:

Please indicate your assessment of the organisation	Not assessed	Poor	Adequate	Good	Excellent
by ticking the appropriate box for each of the following categories:	0	1	2	3	4
Overall satisfaction with performance of the organisation to meet the overall aims and objectives of the product required.					
Flexibility and co-operation of the personnel assigned to work with you.					
Professional competence demonstrated by the organisation including the ability to meet deadlines and performance targets.					
Ability of the organisation to provide suitably qualified and experienced individuals to work with your organisation on the service (i.e. did they have sufficient capacity to deliver when required)					

Quality of the overall service by the organisation					
Working relationship between yourselves and the organisation					