



Tender Brief

for

Tenant Portal Software Services

**on behalf of
Victory Housing Trust
Tom Moore House
Cromer Road
NORTH WALSHAM
Norfolk
NR28 0NB**

4 April 2017

Introduction and objective

Victory is a registered charity and registered provider of affordable homes for those in need of housing. Victory owns approximately 5,000 properties, serving around 9,000 residents, located in Norfolk and has an annual turnover of £23 million.

We believe everyone deserves to live in a good, affordable home and that homes that meet people's needs give stability to their lives and help communities flourish. Within the Norfolk area of operation, we feel Victory is big enough to make a difference, yet small enough to care. We recognise the need to use our resources efficiently to provide value for money. We firmly believe that it is not just what we do that matters, but how we do it; our 'Victory spirit', which we define as being positive, supportive and caring.

Our way of working is:

- We put people first: we keep people at the heart of everything we do and value their differences.
- We say what we mean and mean what we say: we are clear and consistent in what we do.
- We love what we do and why we do it: we enjoy and take pride in our work.
- We are positive: we make things happen and achieve results.

The purpose of this contract is to implement a Tenant Portal to provide a range of online self-service tenancy services to Victory tenants and to encourage a self-service approach. This will improve and extend the range of available services and will support and enable channel shift to online services for those customers and issues that can be self-served/transacted online, and so free up resources to focus on those customers and issues which require a more traditional approach.

Victory currently provides no tenant portal service for residents – such a service would enable our tenants to view their rent account and other information relevant to their tenancy online, and carry out (self-serve) some transactions and functions online. Many Housing Associations do provide tenant portals and this tender requirement is for a Tenant Portal system to provide this service for our tenants.

The overall objective is for tenants to be able to access a range of up to date information and services online at any time, thereby encouraging more proactive interaction with tenants, for example enabling tenants to monitor their rent account and repairs activity (e.g. pending appointments), thus reducing the risk of arrears and missed repairs appointments. Providing the portal will also enable the easier and faster distribution of information to subscribed tenants and could more inclusively engage and involve tenants spread across a wide geographical area.

Copies of the following documents are enclosed within this tender document for further background information relevant to this enquiry:

- Victory Contract Terms and Conditions including Schedule 3 (Appendix A)
- Victory's Respect framework (Appendix B) incorporating: Governance and Financial Viability Policy, Code of conduct for service providers, Customer Care Policy, Health & Safety policy, Anti-fraud & corruption policy
- Data Protection & Personal Data Destruction Statements and Confidentiality Agreement (Appendix C)
- Respect Framework Declaration (Appendix D)
- Certificate of non-collusion (Appendix E)

The specification detailed in the contract scope section overleaf in conjunction with the Schedule 1 Specification outlines Victory's specific requirements.

The purpose of this contract is to ensure Victory achieves the aims above and fulfils its commitments and obligations.

1. Scope of the Contract and Services Required

Victory requires an experienced service provider who has resources, including staff with an appropriate level of experience and skills, to undertake all relevant tasks associated with the successful delivery of the contract.

- 1.1 The services under the contract will be for a duration of three years from the date of appointment with the option to extend the contract in one year extensions for up to five years from the date of appointment.
- 1.2 The successful service provider will have at least three instances of their Tenant Portal product in active use by UK based Housing Associations with housing stock sizes of at least 2,000 units, and be able to provide at least two reference customers.
- 1.3 The successful service provider will need to demonstrate the necessary adequate and resilient staffing and resources to be able to competently and professionally develop, implement and support their Tenant Portal product.

2. Specification

Accessibility

- 2.1 The Tenant Portal must be accessible to all users and therefore fully Equality Act compliant.
- 2.2 The Tenant Portal must be compatible and scalable with all common devices (PC, Laptop, Tablet, Smartphone).
- 2.3 The Tenant Portal must be inherently simple to navigate to ensure that user journeys are fast and clear.
- 2.4 The Tenant Portal must be compatible with all common browser software including (but not limited to) Google Chrome, Firefox, Safari, Internet Explorer, Microsoft Edge & Android.

Access controls

- 2.5 Simple user registration (for example by tenancy reference and confirmation of name).
- 2.6 User password self-serve (resets etc.), configurable validation checks.
- 2.7 Ability to create reliably secure areas for specific user groups.
- 2.8 Role based security system that can be restricted to read only.
- 2.9 Security timeout when not used for a period.

2. Specification (continued)

Functional Requirements

- 2.10 Customer Alerts that come up when tenants log in – such as rent arrears or gas service overdue, and are configurable to require reportable clicking past (to confirm acceptance of liability) and/or may require tenant to contact Victory.
- 2.11 Tenants are able to view/update household information with optional validation.
- 2.12 Tenants are able to view/update communication details and preferences with optional validation.
- 2.13 Tenants are able to view all property related documentation.
- 2.14 Tenants are able to view current repairs logged and repairs history for property, block, estate.
- 2.15 Tenants are able to view current and historical Contact Management System (CMS) interactions with Victory.
- 2.16 Tenants are able to upload pictures and documents to designated areas.
- 2.17 Tenants are able to view and print rent statement (and mini statements) and other account information such as current balance, service charges etc.
- 2.18 Tenants are able to view rent transaction history (as per current information in Housing Management System).
- 2.19 Online configurable forms (e.g. complaint, end of tenancy, request for permission, etc.) can be created, configured and operated.
- 2.20 Able to send forms and data to tenants by uploading to tenant online account and alerting via email/link.

2. Specification (continued)

Functional Requirements (continued)

- 2.21 Tenants are able to subscribe to tenant events from the portal.
- 2.22 Tenants are able to publish community events or other information to selected portal users (by role/access permissions).
- 2.23 Victory staff can view tenant view (subject to access permissions).
- 2.24 Tenants are able to opt out of paper rent statements or other documentation as appropriate.
- 2.25 Tenant Portal includes an integral audit tool to confirm when documents viewed or downloaded.
- 2.26 Tenant Portal enables new housing applicants (non-tenants) to register for online services for eligibility checks and document submission etc.

Appearance & Branding

- 2.27 Able to design and brand with a relevant look and feel.
- 2.28 Consistent branding with other Victory publications.

2. Specification (continued)

Technical Requirements

- 2.29 Effective administration tool for creating and managing users, password, permissions and roles.
- 2.30 Fully compatible with Civica Universal Housing/Contact Manager Housing Management System (HMS), to enable the simple and fluent exchange of all relevant data between the portal and the HMS, with the options to transfer data in batch, scheduled and real-time modes as appropriate.
- 2.31 Resilient hosting service delivered to an agreed service level that will deliver 99.75% availability of the Tenant Portal measured across 24 hours x 365 days a year.
- 2.32 Following successful implementation, ongoing support of the Tenant Portal website delivered to an agreed service level, specifically: 2 hour response, Mon-Fri 08:00 – 20:00 for any issues affecting the availability of the Tenant Portal to users; 4 hour response Mon-Fri 08:30 – 17:00 for all other issues.
- 2.33 Built-in reporting and/or reliable integration with online analytics.
- 2.34 The Tenant Portal should also have compatible capability, and potential, for further development to add in other functions as services develop. These may include enabling residents to launch workflows that will integrate with the Civica Contact Manager CMS system to log and appoint repairs, contact or support visits.
- 2.35 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. This requires availability Mon-Fri 09:00 – 17:00, with an 8hr support response.

2. Specification (continued)

Victory will reserve the right to terminate a contract early if, at its absolute discretion, it considers that either an appointed service provider is in breach of the terms of contract or if the performance of the Services consistently falls below the standard expected. Where the contract is terminated early Victory will not accept liability for any loss of earnings claimed by the service provider.

3. Additional Charges for additional services

Victory may require the service provider to execute other relevant tasks, i.e. issue further Variations under the service contract terms and conditions, for which reasonable additional charges calculated in accordance with the rates tendered will be payable.

The successful organisation may be required to provide such additional services on either a lump sum quotation or, e.g. where such services cannot be accurately scoped, on a time charge basis in accordance with tendered rates included on the price list.

If you require any clarification or further information in connection with this invitation to tender please contact Mark Turner, Procurement Manager on 01692 502493, mark.turner@victoryhousing.co.uk . Additional information provided following further requests or discussions during the tender period may be published on Victory's website.

Contract Terms and Conditions

Appendix A Contract Terms and Conditions contains the Victory Terms of Business for the Purchase of Tenant Portal Software Services which includes the following:

- Schedule 1 Purchase Order
- Schedule 2 Supplier's Schedule of Rates
- Schedule 3 Specification (including Tender Brief and Appendices)

Schedule 2 will comprise the appointed Supplier's submitted tender Price List as accepted by Victory. Tenders are required on the schedule to include all mark ups, fees payable to third parties, travelling and other expenses to provide the service. This will be incorporated in the formal agreement.

The above Terms & Conditions will apply to any contract entered into by Victory Housing Trust following this tender.

The supplier should familiarise themselves with the details contained in the Appendices A, B, C, D & E and take account of the obligations when submitting its tender.

Together with this 'Tender Brief for Tenant Portal Software Services' dated 4 April 2017, and other Appendices listed above in this Brief, these documents along with a selected supplier's tender will comprise any formal agreement entered into by Victory and a selected supplier.

The Supplier shall submit any invoice including written reference to the Victory Purchase Order number provided by Victory.

Contract Terms and Conditions (continued)

Respect framework

Respect Framework means the Victory Respect Framework included in Appendix B and Annexes thereto. The Supplier undertakes to Victory that it shall (and shall ensure that all of its Staff) comply with any requirements under the Respect Framework which arise in connection with the performance of the service and are appended to this brief as Appendix B and Annexes thereto.

The Supplier shall (and shall ensure that all of its Staff) comply with any requirements under the Health and Safety at Work Act and both Victory and the Supplier will duly observe all their obligations under the Health and Safety at Work Act which arise in connection with the performance of the service.

The Supplier shall, within 14 days of a written request by Victory, execute the Declaration included in Appendix D.

Data protection

Data Protection Policy means Victory's Data Protection Policy included in Appendix B. The Supplier undertakes to Victory that it shall comply with the Victory's Data Protection Policy.

The Supplier shall, within 14 days of a written request by Victory, execute the Data Protection Statement included in Appendix Ci.

The Supplier shall, within 14 days of a written request by Victory, execute the Personal Data Destruction Statement included in Appendix Cii.

The Supplier shall, within 14 days of a written request by Victory, execute the Confidentiality Agreement included in Appendix Ciii.

Corruption

The Supplier shall, within 14 days of a written request by Victory, execute the declaration included in Appendix E.

Appendix A – Contract Terms and Conditions

Appendix B –Victory Respect Framework

Appendix Ci – Data Protection Statement

Appendix Cii – Personal Data Destruction Statement

Appendix Ciii – Confidentiality Agreement

Appendix D – Respect Framework Declaration

Appendix E – Certificate of non collusion