

20 January 2017

To whom it may concern,

THE REGENDA GROUP - OCCUPATIONAL HEALTH & EMPLOYEE ASSISTANCE SERVICE PROVISIONS – INVITATION TO TENDER

You are invited to submit a tender bid to provide Occupational Health and / or Employee Assistance Programme service provisions to The Regenda Group.

This document provides background information regarding our Group as well as tender requirements and details of the selection process.

You may submit tenders for one or both lots. You should read this document carefully prior to submitting a tender.

The Regenda Group

The Regenda Group is a great quality, forward thinking housing business, building, managing and maintaining the homes people need.

The Group is made up of Regenda Homes and its wholly-owned subsidiaries M&Y Maintenance and Construction, Redwing Living, McDonald Property Rentals and The Petrus Community. The Group employs around 550 people, has assets of over £489 million and a turnover of £64 million. The Group head office is based at The Foundry in the heart of Liverpool city centre.

Regenda Homes is a housing association with over 10,000 properties in the North West. Most of these are social rented housing; the company also has over 30 Independent Living schemes for older people, and 160 supported homes.

Regenda Homes aims to support its residents to realise their full potential and to ensure they have the best possible quality of life in healthy, safe, prosperous and sustainable communities. It works with a range of partner organisations to provide affordable housing and to achieve sustainable community regeneration.

Regenda Homes has regional offices in Liverpool city centre, Fleetwood and Oldham.

M&Y Maintenance and Construction provides responsive repairs, planned works, renewables and new build services to clients across the North West. We are proud of our reputation as an established, award winning, reliable and responsive maintenance provider.

M&Y employs over 200 permanent employees across its state of the art head office in St Helens and its local depots in Oldham and Poulton-le-Fylde.

Redwing Living has been established for over 30 years. It offers private rented properties, leasehold and apartment block management and shared ownership and sales, managing over 2,000 homes and retirement properties across the North West. The company also owns and manages commercial premises.

McDonald Property Rentals is the Fylde's leading lettings agency. Established for more than 40 years, it has offices in Blackpool and Cleveleys and manages a substantial portfolio of homes from smaller apartments to larger family houses. The business offers a high-quality, personal service to landlords and tenants.

The Petrus Community is a registered charity which has been providing supported housing and services to homeless people 1972. They do this throughout the Borough of Rochdale (including Heywood and Middleton), Rossendale and Oldham.

Petrus believes people should have access to safe, secure, quality, housing. They exist to support a wide range of people in housing need and develop their skills, independence and choice. They have a strong commitment to actively involve those who use their services.

Our values

Our values are the operating principles that guide our conduct and our relationship with customers, partners and stakeholders:

- Customer focus
- High performance
- Efficiency and value for money
- Teamwork
- Ambition and dynamism
- Openness and honesty

Lot 1: Occupational Health service provisions

The successful provider must be able to offer the following service provisions:

- Occupational Health referrals
- New employee health checks (i.e. suitability for employment and assessment of existing health conditions)
- Annual health surveillance programmes (potentially including HAVS, dermatitis, respiratory, hearing, manual handling, asbestos, night workers)
- Dedicated account manager and ability to provide meaningful management information as requested by the Company

The tenderer may also wish to outline any additional services that may be offered i.e. physiotherapy, counselling, vaccinations, health checks, complimentary therapies, specialist assessments (i.e. dyslexia).

Contract terms

This is a two year contract that will be reviewed three months before the end of completion with the option to extend for a third year. However we reserve the right to review the contract at any time during this period as well as to terminate the contract due to unsatisfactory performance.

Full details can be found in our Purchasing terms and conditions (enclosed).

Requirements

The following are minimum requirements for potential service providers:

- Practitioners must possess as a minimum a degree in Occupational Health or the Occupational Health Nursing certificate
- Ability to provide contact details for a minimum of two relevant, independent referees whom Regenda can contact as part of the selection process
- Ability to attend OH appointments at Regenda Group offices as well as employee home addresses within the North West of England
- Ability to respond to specific case or general queries raised by authorised Regenda personnel within 24 hours
- Ability to identify and recommend reasonable adjustments required in line with the Equalities Act 2010

- Ability to liaise with other third parties relevant to cases (i.e. counsellors, doctors, physiotherapists)
- Ability to adhere to relevant legislation (i.e. Data Protection Act, Access to Medical Records Act)
- Ability to contribute positively to Regenda Group initiatives to reduce sickness absence and boost employee health and well-being
- Ability to meet the following service provision and reporting timescales:

Item	Service provision	Report generation
New employee health check	Review of standard questionnaire within 48 hours of receipt	Email certificate of suitability for employment within 24 hours of questionnaire review
New employee health referral	Face to face or telephone appointment with OH practitioner within 5 working days of review of questionnaire	Email certificate of suitability for employment within 24 hours of appointment or written report of recommendations within 72 hours of appointment
Occupational health referral	Face to face appointment within 5 working days of referral	Email copy of report within 72 hours of appointment
Annual health surveillance programmes	Reviews of standard questionnaires within two weeks of receipt	To be agreed with successful provider

In addition to confirmation of the above, you should also provide the following information alongside your tender submission:

- Audited accounts for the last financial year
- A copy of your company health and safety policy
- Details of insurance
- Company profile

DBS checks

It is a requirement that all staff dealing face to face with our employees are fully DBS checked and that documentary evidence is provided to confirm this.

Communication

There must be a suitable communication procedure established between the account manager and People Services and/or Health & Safety teams.

Any concerns regarding the contract should be addressed by the People Services team.

TUPE

We do not believe that the Transfer of Undertaking (Protection of Employment) regulations will apply in this instance.

Lead officer

The People Services Manager will act as lead and will be your main contact for this tender process.

Lot 2: Employee Assistance Programme

The successful provider must be able to offer the following service provisions:

- 24 hours per day, 365 days per annum confidential helpline service to all Group employees
- Advisory services relating to medical, financial, legal and personal issues
- Dedicated account manager and ability to provide meaningful management information as requested by the Company

The tender document should also detail any additional services that may be offered by the provider, i.e. physiotherapy, counselling, CBT, vaccinations, health checks, complimentary therapies, discounts.

Contract terms

This is a two year contract that will be reviewed three months before the end of completion with the option to extend for a third year. However we reserve the right to review the contract at any time during this period as well as to terminate the contract due to unsatisfactory performance.

Full details can be found in our Purchasing terms and conditions (enclosed).

Requirements

Please include the following information in your tender:

- Confirmation that telephone lines are manned 24 hours per day, 365 days per annum by qualified, trained personnel
- Ability to produce meaningful management information to a standard and frequency agreed with the Company
- Ability to produce materials / campaigns promoting usage of the service
- Ability to refer employees for a minimum of six face to face counselling sessions within an area local to their home address

In addition to confirmation of the above, you should also provide the following information alongside your tender submission:

- Audited accounts for the last financial year
- A copy of your company health and safety policy
- Details of insurance
- Company profile

Communication

There must be a suitable communication procedure established between the account manager and People Services and/or Health & Safety teams.

Any concerns regarding the contract should be addressed by the People Services team.

TUPE

We do not believe that the Transfer of Undertaking (Protection of Employment) regulations will apply in this instance.

Lead officer

The People Services Manager will act as lead and will be your main contact, for this tender process.

Proposal submissions

Your response should be returned to me by 5pm on 10 February 2017 either:

via email to:

sean.rothwell@regenda.org.uk

or via post to:

Sean Rothwell, People Services Manager
The Regenda Group
The Foundry
42 Henry Street
Liverpool
L1 5AY

Your response must include the following:

- 1 - Minimum standards template (completed for each lot you wish to be considered for)
- 2 - Pricing template (completed for each lot you wish to be considered for)
- 3 - Written tender response (completed for each lot you wish to be considered for)
- Additional supplementary documentation required (i.e. company profile, insurance and accounts documentation, H&S policy, qualifications, referee details)

Shortlisting process

Your tender submission will be assessed on the following elements:

- Service provision (40%)
- Added value (i.e. ability to meet our values, flexibility, additional services offered, management information provision) (20%)
- Cost (40%)

Final selection process

The top three scoring bidders for each lot will be invited to take part in the final selection process.

The final selection process will consist of a structured interview and presentation to the People Services and Health & Safety teams.

Contract award

A final decision and contract award will be based on the following elements:

- Tender submission score (50%)
- Final stage selection score i.e. interview and presentation (50%)

Please note that given the assessment criteria outlined above, the tender will not be awarded on price alone.

Key dates

Tenders to be returned by:	10 February 2017
Interviews:	w / c 27 February 2017
Final decision:	w / c 3 March 2017
Contract commencement:	1 April 2017

I look forward to receiving your proposals. Should you have any queries please do not hesitate to contact me.

Yours sincerely



Sean Rothwell
People Services Manager