

**Request for Information**

Stonewater Limited

[Repairs and Maintenance Package]

[08.03.2022]

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# **Introduction**

* 1. **Stonewater**

Our significant and progressive house-building programme aims to build a minimum of 1,500 new homes a year from 2022/23 and we have a good pipeline of development to achieve this, driven by our vision of everyone having the opportunity to have a place that they can call home. We plough our surplus into building new homes, improving our existing housing stock and investing in customer services.

We are also the largest management partner for Legal & General Affordable Homes, supporting the organisation in delivering its ambitious development plan of building 3,000 homes by 2022, by leading on Legal & General's housing operations across England.

We recognise that the way we work matters too. We are committed to providing homes that are energy efficient and are working towards Government's targets for carbon neutrality. Our Environment Strategy helps us minimise the resources we use as an organisation and manage our impact on the environment.

Our talented 800+ employees embody our values – being ambitious, passionate, agile, commercial and ethical. We have recently achieved a ‘two star’ rating in the 2021 Best Companies Top 100 best not-for-profit organisations to work for and made the list for the top 25 best housing sector organisations to work for in the UK.

With an annual turnover of around £191 million and £1.8 billion in assets, Stonewater is a strong, dynamic and well-managed social business, with a long-term rating of A+ by independent credit ratings agency, S&P Global Ratings and a top G1/V1 governance and viability ranking from the Regulator of Social Housing.

* 1. **Background to the Requirement**

Stonewater have an existing portfolio of approx. 5000 leasehold and shared ownership properties. Customers in these homes have a responsibility for repairs and maintenance, including gas servicing, regardless of whether they own 100% of the property.

Stonewater wish to work in partnership with a third-party organisation to provide, a repairs and maintenance package for our customers in this portfolio, to include gas servicing at a competitive and preferential rate compared to others on the market. In partnership, with the preferential rate for Stonewater customers, Stonewater are able to promote services to their extensive customer base – as highlighted, currently standing at approx. 5000 homes, which is only set to increase due to development demand.

In addition to the above, the government have updated the shared ownership model. The pipeline of Stonewater’s new shared ownership homes will be delivered on this new model. The model includes a repairs and maintenance allowance, of up to £500 per year. Customers on this model lease will be entitled to claim for qualifying repairs and maintenance up to the value of £500. Stonewater are looking, in conjunction with the package for existing shared owners and leaseholders, to work in partnership with a third party to manage all elements of the repairs and maintenance allowance under the model lease. Stonewater have a pipeline of approx. 250 units a year (this is an estimate) coming through on the new model from 2023 onwards, so would be seeking a preferential rate in return for the guaranteed pipeline of properties that would require this service.

* 1. **Clarifications**

If you have any clarification regarding the contents of this document, please contact [sarah.newton@stonewater.org](mailto:sarah.newton@stonewater.org). All clarification questions must be back by 14th April 2022

# **Current Position**

Stonewater don’t currently offer a repairs and maintenance package for their shared ownership and leasehold customers – the responsibility for this falls to the customers. Stonewater have an obligation to ensure the shared owner/leaseholders are fulfilling the requirements of the lease to ensure the property is maintained to a good standard, alongside ensuring gas safety checks are completed. Stonewater currently have no involvement with repairs and maintenance this portfolio of customers. Stonewater do not have the capacity to operate a package internally.

The new shared ownership model is in its infancy and Stonewater have not yet delivered any homes through their pipeline on the new model, which in turn means we have not yet had to manage the £500 a year repairs and maintenance allowance.

# **Requirement**

There are two separate arms to the requirements, a package for our existing leasehold and shared ownership customers as well as the management of the new repairs and maintenance allowance of £500 for the new shared ownership model lease.

**Existing customers**

Stonewater are keen to ensure the homes are maintained well and gas servicing obligations are fulfilled by the shared owner/leaseholder. The requirements of the package are to work in partnership to deliver:

* Fixed monthly fee, payable by the customer
* Repairs and Maintenance cover for major components in the home (plumbing, heating, electrics etc)
* Annual Gas Servicing Included
* Optional take up (this would be offered to customer base but is optional)
* All customer communication handled directly through appointed firm
* All customer complaints handled directly through appointed firm
* Landing page for Stonewater customers on website/portal
* Digital approach to reporting repairs
* Interfaced with Stonewater for sharing of key documents (Gas Safety Certificates)

**New Repairs and Maintenance Allowance**

Stonewater have an obligation under the new model lease to manage access to a repairs and maintenance allowance of up to £500 per year for certain qualifying repairs. The customer can either report a qualifying repair and Stonewater’s appointed firm complete the repair, or the customer chooses to complete the repair using a trust mark approved trade and is reimbursed the cost of the repair (within the allowance).

* Delivery of repairs and maintenance allowance (up to £500 per year)
* Repairs and Maintenance service for qualifying repairs
* Managing roll over of unused balance
* Delivery of annual statements of repairs balance
* Qualifying repairs to access to allowance
* Flexibility for customer to use their own appointed trade and claim from balance
* All customer communication handled directly through appointed firm
* All customer complaints handled directly through appointed firm
* Landing page for Stonewater customers on website/portal
* Digital approach to reporting repairs
* Key reporting requirements for volume/type of repairs

# **Replying to the Request for Information**

* 1. **Introduction**

Suppliers are asked to complete section 4.2 – 4.5

* 1. **Requirements Review**

Please provide a response against each point in the table below as outlined within section 3 , confirming whether you;

- Fully meets requirement

- Partially meets requirement

- Unable to meet requirement

Where a supplier is unable to provide a response that fully meets the requirement stated, more detail is requested in the third column of the table.

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| --- | --- | --- |
| **Requirement** | **Response** | **Additional Comments** |
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* 1. **Indicative Costs**

Using the information supplied about Stonewater’s requirement, suppliers are asked to provide potential contract costs. Costs provided are only indicative and will not be assessed as part of any future tender.

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| --- | --- | --- |
| **Details -** *Insert types of costs, dependent on the project* | **Costs (ex VAT.)** | **Comments** |
|  |  |  |
| **Total** |  |  |

* 1. **Indicative Timescales**

Interested parties are required to provide a high level estimate for the delivery of Stonewater’s requirement based on the information provided in this document.

* 1. **References**

Interested parties are required to provide three examples from within the past 2 years of projects delivered that match Stonewater’s requirements.

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| --- | --- | --- | --- |
| **Customer Name** | **Contact Name and Email Address** | **Date Project went live** | **Summary of the project/Requirement** |
|  |  |  |  |

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| **Customer Name** | **Contact Name and Email Address** | **Date Project went live** | **Summary of the project/Requirement** |
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