

Invitation to Tender

Rent & Service Charge Documentation
Design & Production

Issued 10th September 2018

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1.0 Introduction to Leeds Federated

Leeds Federated Housing Association (The Association) is a registered social landlord formed in 1974 for the benefit of the community. The Association has a central office in Leeds.

The Association employs approximately 120 staff and provides approximately 4,000 homes in Leeds, Harrogate and Wakefield Districts.

The approximate housing portfolio breakdown is:

3200	general needs properties
210	supported housing properties
260	sheltered properties
210	shared ownership properties
85	non-social properties

Our vision statement describes what the Association is aiming to achieve over the medium to long term:

Building Futures Together

The vision statement reflects our aim to grow through *building* more homes. It is our intention to enable our customers to consider their *future* knowing they have a place they can call home. The Association will work *together* with staff, customers and other stakeholders in making our vision a reality.

The three goals of the Association are as follows:

1. Sustain

We will provide good quality homes that people want to live in and provide value for money services, delivering quality at an affordable cost. We will maintain a healthy business in terms of its finances, expertise and governance.

2. Innovate

We will make the best use of technology to improve the efficiency and effectiveness of services and find ways to work smarter. We will adapt to change in our business and operating environment to remain competitive.

3. Grow

We will expand our delivery of good quality homes and identify new business opportunities to enhance Leeds Federated's viability. We will grow our capacity, skills and influence to support the business.

2.0 Background Information

- 2.1 This document sets out the Association's requirements for the provision of Rent Documentation production and provides information about the Association and the key criteria for this contract. Importantly, it also contains the specific requirements that tenderers are to respond to, as well as setting out the evaluation criteria and scoring system that the Association will be using to apply to responses.
- 2.2 This Tender is being advertised on Contracts Finder. All documents are available on this portal. Interested tenderers are advised to 'watch' the notice to receive notifications if the notice is updated.
- 2.3 Any queries should be placed in writing (e.g. email) and directed to Joanne Harrison, Procurement & Contracts Coordinator, email: procurement@lfha.co.uk. **The latest date for the receipt of queries is midday on Friday 28th September 2018.**
- 2.4 A full list of any queries raised by a tenderer during the tender stage will be created and disseminated to all tenderers at the same time (if and when they occur) via an update to the Contracts Finder notice. Interested tenderers are advised to 'watch' the notice to receive notifications if the notice is updated with new queries

3.0 Timescale

Circulate Invitation to Tender	10 th September 2018
Deadline for submission of clarifications	Midday 28 th September 2018
Submission of tenders	Midday 5 th October 2018
Evaluation of tenders	8 th October to 19 th October 2018
Take Up of References	By 19 th October 2018
Internal Board approvals	23 rd October 2018
Notice of Award	By 1 st November 2018

Dates are correct at time of publishing the Invitation to Tender and may be subject to change

4.0 Brief

- 4.1 Leeds Federated are looking for a supplier to produce customer rent documentation (rent review documentation to include a service charge statements and rent statements) using data generated from the Housing Management System to generate customised content.
- 4.2 Currently rent statements are generated 4 times a year. Rent review documentation & service charge statements are generated annually and are time critical.
- 4.3 The Association requires a complete redesign of the rent documentation in order to improve customer understanding of the content.
- 4.4 Initially all the rent documentation will be issued to customers via post however the organisation is looking to provide multiple output channel services as required, to include secure electronic document delivery.

- 4.5 The Association also requires a complete set of all rent documentation issued so it can be uploaded on to the Association's EDM system and be indexed to the correct customer.
- 4.6 The first document will be the Rent Statement issued in April 2019 and quarterly thereafter.
- 4.7 It is anticipated that the Rent Review and Service Charge Statements will first be prepared in January 2020 for issue in February 2020 and yearly thereafter. There could be a possibility of being ready to achieve this in January 2019 instead so please indicate if this would be feasible.
- 4.8 This will be an initial 3 year contract (contract expiry 30/04/22), with an optional extension of up to 2 years.
- 4.9 There is a requirement for a 10% of the outputs to be sent to The Association as a .pdf to enable checking before any documents are posted to customers.
- 4.10 Performance Reviews

The Association will hold an annual account meeting with the Partner. The Partner will send the appropriate personnel to each meeting with the Association which shall focus on the service delivered. For the avoidance of doubt, attendance at such meetings will be at no additional cost to the Association.

4.11 Rates

The Association is looking to have in place **Pre-Agreed, Fixed Rates** for all items provided under the agreement for the duration of the contract term (it is acknowledged that postage rates may change). That is to say that the rates other than postage may not be increased by the tenderer throughout the initial 3 year term (to 30/04/22). Please indicate on the pricing matrix the method that would be applied for any increase for year 4 and 5.

VAT shall be charged at the prevailing rate.

Tenderers are referred to the Pricing Matrix within this Invitation to Tender to provide details of their prices.

5.0 Evaluation of Tender Submissions

- 5.1 The Association reserves the right to exclude a Tender from evaluation if it does not conform to the Tender requirements or does not demonstrate sufficient capability to perform the required work.
- 5.2 Award will be based on the most suitable solution and most economically advantageous tender received, where Price tendered accounts for 40% of the overall score and Quality accounting for 60%.
- 5.3 The Quality score will be split into 2 areas, 50% for the written responses to the tender, 10% for the references.

The scoring mechanism is as follows:

i. Pricing: (40% of the overall score)

This sets out the pricing information required by the Association for evaluation and appointment of the successful Partner(s).

A price score shall be calculated for each tender by reference to the lowest tender, which is given a points score of 100. One point shall be deducted from each of the other tenders for each percentage point above the lowest in accordance with the following formula:

$$\text{Maximum Available Price Score (100)} \times \frac{\text{Lowest Price received}}{\text{Tenderer's Price}}$$

A maximum price ratio score of 40% shall be given to the lowest price. The price ratio score shall then be calculated for each other tender according to the points achieved as a proportion of 100.

Tenderers shall note that tenders considered to be priced very low shall be scrutinised to ensure that this is not as a result of a failure to understand the requirements of the Contract. The Association shall have the right to disregard any tender that it considers to be abnormally low.

ii. Quality – Written responses to Quality Questions (50% of the overall score)

This measures the responses to the Quality Questions set in the Tender and will be scored in accordance with the table below unless otherwise stated against the question:

Evaluation of answer	Marks
Completely fails to meet required standard or does not provide a proposal	0
Proposal significantly fails to meet the standards required, contains significant shortcomings and/or is inconsistent with other proposals	1
Proposal falls short of achieving expected standard in a number of identifiable respects	2
Proposal meets the required standard in most material respects, but is lacking or inconsistent in others	3
Proposal meets the required standard in all material respects	4
Proposal exceeds the required standard and delivers added value	5

All tender responses must be submitted as a read-only MS Word document with 'Arial' Font, size 11.

Supporting information may be submitted as appendices, but will not be scored.

The highest scoring Tenderer for **Quality Questions** will be awarded the full 50% available. The remaining Tenderers will be awarded a percentage score based on the following calculation.

$$\text{Maximum Available Quality Score (100)} \times \frac{\text{Tenderer's Total Score out of 60}}{\text{Highest Score awarded out of 60}}$$

iii. References (10% of the overall score)

References will be taken up from the referees provided during the tender evaluation period (ending 19th October 2019). The references will seek to confirm the Tenderer's ability to perform this contract. The format of the reference request can be seen at Appendix B.

The references will be scored in accordance with the following:

Q1 (per answer – 6 areas)	Marks	Q2	Marks
Very Poor	1	NO	0
Poor	2		
Average	3	NOT SURE	5
Good	4		
Very Good	5	YES	10

The highest scoring Tenderer references will be awarded the full 10% available. The remaining Tenderers will be awarded a percentage score based on the following calculation.

$$\text{Maximum Available Reference Score (100)} \times \frac{\text{Tenderer's Total Score out of 40}}{\text{Highest Score awarded out of 40}}$$

iv. Combining Price & Quality (Overall Score)

The adjusted percentage scores for Quality/Price will be added together to give an overall percentage score as below.

$$(\text{Price Score} \times 0.40) + (\text{Quality Score} \times 0.50) + (\text{Ref. Score} \times 0.10) = \text{Total score out of 100}$$

6.0 Terms of Appointment

- 6.1 The contract will be awarded on the basis of the most economically advantageous tender, and Tenders will be evaluated on the offer price and on the Tenderer's experience and capability.
- 6.2 Appointment will be on the basis of a 3 year contract (end date 30/04/22) with an optional extension up to a further 2 years to 30/04/24. Tenderers are requested to include with their response a copy of their proposed Terms and Conditions for the contract, for review and mutual agreement. Where there is a conflict between the Terms & Conditions provided and this tender / the Tenderer's

response, the ITT and response will take precedence. The Terms and Conditions submitted shall include payment milestones and a proposed invoice schedule.

- 6.3 The Association reserves the right to award a contract for all or any part of the work specified in this invitation to tender, or not to award a contract.
- 6.4 The Association may award a task or series of tasks to the awarded Partner, another Partner or retain the task and carry it out itself.
- 6.5 The Association does not guarantee any award of work or any minimum payment to the Partner under this Agreement. The tenderer acknowledges and agrees that the Association shall have no liability whatsoever (whether under Term Partnering Agreement, statute, tort or otherwise) in respect of any consequential or indirect loss or any actual or expected loss of profit, loss of revenue, loss of goodwill or loss of opportunity in the event that the Association reduces or reallocates any amount of works awarded to the Partner.

7.0 Terms and Conditions

- 7.1 The Association reserves the right to award a contract for all or any part of the work specified in this Invitation to Tender, or not to award a contract. The Association also reserves the right to award the contract to more than one Tenderer.
- 7.2 The successful Tenderer will be required to sign and abide by a contractual agreement, and will submit staged invoices and reports in the prescribed format at intervals determined by the Association. Payment terms are 30 days from receipt of invoice with payment by BACS.
- 7.3 Any variations to the fee due to fundamental changes in the nature of the project shall be by negotiation between the parties.
- 7.4 It is expected that the Contractor will maintain the following insurances at Contract award:

Employers (Compulsory) Liability Insurance for a sum insured of not less than £5,000,000
Public Liability Insurance for a sum insured of not less than £5,000,000
Professional Indemnity Insurance of not less than £2,000,000
Product Liability Insurance of not less than £5,000,000

The Tenderer will supply the Association with full particulars of such insurance to accompany their Tender submission.

7.5 Data Protection

(i) The appointed Partner will:-

- 1. Duly observe their obligations under the Data Protection Act 1998 and associated Regulations to ensure full compliance with the law relating to personal information.
- 2. In this clause references to Personal Data are to be interpreted as defined in the Data Protection Act 1998 ("DPA") and related case law. The Partner shall comply with all relevant provisions of the DPA and do nothing which causes, or may cause, The Association to be in breach of its

obligations under the DPA. In particular, to the extent that the Partner acts as a Data Processor in respect of any Personal Data pursuant to this Agreement, the Partner shall only process such Personal Data as is necessary to enable it to fulfil its obligations under the contract and only in accordance with instructions from the Association. The parties hereby agree that the Association shall be the Data Controller in respect of such Personal Data.

3. From its introduction in May 2018, any reference to the DPA shall also refer to the General Data Protection Regulation (GDPR).

(ii) The Partner shall:

1. Implement technical and organisational measures in place to protect any personal data it is processing on The Association's behalf against any unauthorised or unlawful processing and against any accidental loss, destruction, damage, alteration or disclosure and undertakes to maintain such measures during the course of this Contract. These measures shall be appropriate to the harm which might result from any unauthorised or unlawful Processing, accidental loss, destruction or damage to the Personal Data which is to be protected.
2. Take all reasonable steps to ensure the reliability of its staff having access to any such Personal Data.
3. Monitor and maintain the integrity of all Personal Data in full accordance with the Data Protection Principles.
4. Obtain prior written consent from the Association in order to transfer the Personal Data to any sub-contractors or affiliates to fulfil their obligations under this Contract. This is subject to the confidentiality issues as set out in this document.
5. Ensure that all employees of the Partner who reasonably require access to the Personal Data are informed of the strict confidential nature of the Personal Data; and
6. Ensure that no employees of the Partner publish, disclose, or divulge (whether directly or indirectly) any of the Personal Data to any third party unless directed in writing to do so by The Association.
7. Notify The Association within 5 (five) working days if it receives any complaint, enquiry or request from any person whatsoever relating to The Association's obligations under the DPA.
8. At its sole cost, promptly to provide The Association with full cooperation and assistance in relation to any complaint, enquiry, or request made to the Partner which shall include, but shall not be limited to:
 - (i) Providing to The Association full and complete details of the complaint, enquiry or request;
 - (ii) Complying with a data access request and within the relevant timescales as set out in the Data Protection Legislation and in accordance with The Association's instructions;
 - (iii) Providing to the Association any and all Personal Data it is in possession of in relation to tenants/ residents and shall do so within the timescales required by The Association and notified to the Partner; and
 - (iv) Providing to The Association any and all relevant information requested by the Association.
9. Upon reasonable notice, allow the Association access to any premises owned or controlled by the Partner to enable the Association to inspect and audit its procedures and shall, upon the Association's request from time to time, prepare a report for the Association in respect of the technical and organisational measures it has in place to protect the Personal Data.

10. Warrant that it has submitted, pursuant to section 18(1) of the DPA, a notification to the Information Commissioner (as defined by the FOIA) and shall keep that notification correct, complete and up to date.
11. Not transfer any Personal Data (whether in whole or in part) to any country outside of the European Economic Area unless authorised in writing to do so by the Association and, where the Association authorises such transfer, the Partner shall fully comply with:
 - (i) The obligations of the Data Controller under the Eighth Data Protection Principle set out in Schedule 1 of the DPA by the provision of an adequate and appropriate level of protection in respect of any Personal Data which is transferred in accordance with this and;
 - (ii) Any reasonable instructions notified to the Partner by the Association.
12. Upon the termination of this Agreement for whatever reason, unless notified otherwise by the Association or required by the law, immediately cease any and all processing of the Personal Data on the Association's behalf, and destroy or provide to the Association with a copy of all such Personal Data on suitable media.
13. Upon receipt of any request from the Association to do so, promptly amend, transfer, or delete the Personal Data (whether in whole or in part). Upon deletion of the Association's data, the Partner will not be able to provide any reports or other benefits relating to any deleted data.
14. When required to collect any Personal Data on behalf of the Association, ensure that the Partner provides to the Data Subjects, from whom the Personal Data is collected, with a fair processing notice in a form to be agreed by the Partner.
15. Comply with all reasonable requests or directions by the Association to enable The Association to verify and / or procure that the Partner is in full compliance with its obligations under this contract.

8.0 Submitting your Tender Proposal

- 8.1 All tenderers are deemed to have made sufficient allowances for all proposed pricing requirements including contingencies where required. Contingencies or other like allowances are to be clearly indicated on the Tender submission.
- 8.2 The tenderer must acquaint and satisfy themselves with all conditions likely to affect the execution of any of the Services.
- 8.3 The Association will not be liable for any expenses incurred by the tenderer in the preparation of its Tender.
- 8.4 Tenderers shall note that generic method statements and those of a general nature which refer to information within company profiles, brochures or other promotional and/or marketing literature will not be acceptable.
- 8.5 The tenderer shall complete the Form of Tender in respect of this contract. Please do not amend the format of this form.
- 8.6 The tenderer shall comply with the Non Collusion Statement in respect of this contract and date and sign the Statement accordingly. Please do not amend the format of this form.
- 8.7 Tenderers **must** submit a **hard copy** of their response to the Association.

- 8.8 Tenderers must **not** submit their response to this invitation to tender electronically. A soft copy of the response on CD or memory stick **must** be included with the hard copy. Any email / electronic submissions will be disregarded / deleted.
- 8.9 Tenderers **must** use the Return Label Provided and ensure that they deliver their tenders on time. Please note that we do not have a manned Reception. Deliveries made by methods other than Royal Mail and that need a signature will require the courier to call 0113 3861106 / 1102 or enter extension 1504 / 1505 at the entrance intercom to obtain a signature, between 08:30 & 17:30. A letterbox is available 24/7 for non-signed for deliveries.
- 8.10 Proposals must be received by **Midday on 5th October 2018** by post to Joanne Harrison – you must use the Tender return label on page **17** of this ITT. There must be no other markings anywhere on the envelope whatsoever. If you are using a courier or other method that requires external identification, you should enclose your submission in another envelope bearing the tender return label within the external packaging. Please enclose a hard copy that is signed, and a soft copy on CD / USB stick.
- 8.11 Failure to comply with these requirements may invalidate your tender.

9.0 Supporting Documentation Checklist

9.1 Please ensure that you check carefully and include with your response to this Tender:

- (i) Use the Return Label (page 17)
- (ii) The Form of Tender (Section 12.0)
- (iii) Completed Pricing Matrix
- (iv) Response to Quality Questions (Appendix A)
- (v) Your Terms & Conditions (section 6.2)
- (vi) Signed Certificate of Non Collusion (Section 13)
- (vii) Copies of Insurances (Section 7.4)
- (viii) Soft copy of the entire tender
- (ix) Information at 10.4 below

10.0 Quality Questions

- 10.1 There are 6 Quality questions which have been incorporated at Appendix A – Quality Questions, these are denoted by a Q and are subdivided into individual requirements with a maximum score of 5 points each. Section 1 are Pass/Fail and as such are not scored. Tenderers that cannot answer “Yes” with appropriate evidence to the questions in this section will be excluded from further evaluation.
- 10.2 All tender responses must be submitted as a read-only MS Word document with ‘Arial’ Font, size 11. Your answers should be succinct and not exceed 500 words per answer.
- 10.3 You are asked to provide details of 2 referees. These references will be taken up during the tender review process and will be scored by the Association.
- 10.4 Included with the tender response you are asked to provide the following items. Please note that these are for information purposes only and will not be scored by the Association.
- (i) Company details: Company Background, services provided and head office address information.
 - (ii) Dates and details of last audit.
 - (iii) Contact details for follow up communication regarding your tender

11.0 Pricing Matrix

ID	Description	Unit of Measure	Price (ex VAT)	Qty	Total Price (ex VAT)	Escalation for years 4 & 5
1A	Initial Design	N/A	£	1	£	
1B	Subsequent Design Changes	N/A	£	As Req'd	£	
2A	Initial Set Up	N/A	£	1	£	
3A	Production (8 page A5 booklet)	Per 8 page booklet, 5 times a year	£	3,900	£	
3B	Additional A4 sheet / 4 pages	Per additional sheet	£	3,900	£	
3C	Any Additional Variable Messaging	Per message	£	As Req'd	£	
4A	Delivery – postage 2 nd class	Per mailing	£	3,900	£	
4B	Delivery - electronic	Per mailing	£	3,900	£	
5A	Support / Consultancy	Per Hour	£	As Req'd	£	
5B	Support / Consultancy	Per Day	£	As Req'd	£	

For the purposes of pricing please price on the following assumptions:

- An A5 booklet with 8 pages
- Rent statements will be issued 4 times a year (every 13 weeks)
- Rent Review documents will be issued once a year and will need to be issued by the end of February every year.
- 30 data fields (this is an estimate)
- 5 variable messages (based on logic on the data provided)
- Full colour print

Please note the aim of the pricing matrix is to give comparative costs. We would want to work with the selected company to finalise the design brief based on their specialist advice before agreeing the final cost for the contract.

12.0 Form of Tender

Leeds Federated Housing Association Ltd
Arthington House
30 Westfield Road
Leeds
LS3 1DE

TENDER FOR: Rent & Service Charge Documentation Production

I / We understand that:

- (a) This Tender shall be returned in an envelope with the label provided attached to the front so as to reach this office not later than Midday 5th October 2018.
- (b) The lowest or any Tender will not necessarily be accepted by Leeds Federated Housing Association Ltd, and no allowance or payment will be made for making any Tender.
- (c) We have examined and agree to the Specification, have submitted only one bid and agree to the contract terms.
- (d) We understand that it is our responsibility to ensure that the contract documents have been completed correctly.
- (e) The Tender Price must stand for period of 13 weeks from the date of submission of the Tender.

PRICE

I/We, having read the Conditions of Contract and Specification delivered to me/us and having examined the information referred to therein, do hereby offer to execute and complete in accordance with the Conditions of Contract the whole of the Works described for the sum as identified in the enclosed Pricing Matrix.

I/We agree that should obvious errors in pricing or errors in arithmetic be discovered before acceptance of this offer in the pricing submitted by me/us, these errors will be corrected in accordance with Alternative 1 contained in Section 6 of the 'Code of Procedure for Single Stage Selective Tendering 1989'

Company Name: _____

Employee Name: _____

Signature: _____

Date: _____

Address of Tenderer: _____

Telephone No: _____

Email Address: _____

13.0 Certificate of Non-Collusion

The essence of tendering is that Leeds Federated Housing Association Ltd shall receive bona fide competitive tenders from all organisations tendering. In recognition of this principle, I/we certify that this is a bona fide Tender, intended to be competitive, and that I/we have not fixed or adjusted the amount of the Tender by or under or in accordance with any agreement or arrangement with any other person. I/We also certify that I/we have not done and I/we undertake that I/we will not do at any time before the return date for this Tender any of the following acts:-

1. Communicate to a person other than the person calling for these tenders, the amount, or approximate amount of the proposed Tender;
2. Enter into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount of any tender to be submitted;
3. Offer or pay or give or agree to pay or give any sum or money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other tender or proposed tender for the work any act or things of the sort described above.

In this certificate, the word 'person; includes any persons and any body or association, corporate or unincorporated; and "any agreement or arrangement" includes any such transaction, formal or informal, and whether legally binding or not.

CONFLICT OF INTEREST STATEMENT

Leeds Federated Housing Association Ltd must ensure that it does not contravene Schedule 1, Part 1 of the Housing Act 1996, i.e. Leeds Federated Housing Association Ltd may not make a payment or grant a benefit to a Committee or Board Member, Officer or Employee of the Client save and except in certain specified circumstances. Leeds Federated Housing Association Ltd therefore requires Tenderers to answer the following questions:

1. Has any Director, Partner or Associate been an employee of Leeds Federated Housing Association Ltd within the last five years?

YES/NO (if yes please give details)

2. Please state if any Director, Partner or Associate has a relative(s) who is an employee of Leeds Federated Housing Association Ltd at a senior level or is a Board, Committee, or Panel Member of the Association.

YES/NO (if yes please give details)

3. Please state if any Directors, Partners or Associates of your firm have any involvement in other firms who provide or have provided services to Leeds Federated Housing Association Ltd.

YES/NO (if yes please give details)

4. Is any Director, Partner or Associate an existing tenant or leaseholder of Leeds Federated Housing Association Ltd?

YES/NO (if yes please give details)

Note: A relative is defined as a person's spouse, parent, grandparent, child, grandchild (including illegitimate children and grandchildren) brother and sister. Technically the term relative does not include any relationship that is not by blood, marriage, civil partnership or co-habitation; however, if considered close the same criteria should apply

Signature : _____

On Behalf of:
(Full Name of Tenderer) _____

Address (In the case of a Limited Liability Company the registered office):

Date: _____

Tender Return Label

TENDER – DO NOT OPEN	
<p>Tender Title: Rent & Service Charge Documentation Production</p> <p>Return Date: 5th October 2018</p> <p>Deadline for Return: 12:00 Midday</p> <p>Leeds Fed contact for courier receipt signature:</p> <p>Joanne Harrison: 1106</p> <p>Jane Gillard: 1102 / 1505</p>	<p>To: Joanne Harrison</p> <p>Leeds Federated Housing Association</p> <p>Arthington House</p> <p>30 Westfield Road</p> <p>Leeds</p> <p>LS3 1DE</p>
<p>This label MUST be used to submit your tender</p> <p>There must be no other identifying markings anywhere on the envelope whatsoever</p>	<p>LEEDS FED USE ONLY</p> <p>Date received:</p> <p>Time Received:</p> <p>Initials:</p>

It is Leeds Federated policy not to consider LATE tender submissions

Appendix A – Quality Questions

Section 1 is Pass/Fail. Should a Tenderer be unable to answer 'Yes' with evidence to all questions in this section, the tender will be excluded from further evaluation.

ID	1. Essential Requirements
101	<p>Do you have at least 3 years' experience of designing & producing financial statements using variable data printing?</p> <p>YES / NO</p> <p>Please provide details of similar projects.</p>
Response:	
PASS/FAIL	
102	<p>Do you have the following accreditations: ISO9001 and ISO27001?</p> <p>YES / NO</p> <p>Please enclose copies of your certification.</p>

PASS/FAIL	
103	<p>Do you (or can you) use SFTP to securely transfer files to receive the data for the rent documentation?</p> <p>YES/NO</p> <p>Please provide details</p>
<p>Response:</p> <p>PASS/FAIL</p>	
104	<p>A PDF version of all documentation sent is required so it can be indexed to the Association's EDM solution, please confirm you are able to provide this in PDF format with the following naming convention DOCCODE_TENANCYSID_YYYY-MM-DD-HH-mm-ss.pdf</p> <p>(The DOCCODE will be static and the tenancysid will be provided in the data extract provided to you)</p> <p>YES/NO</p>
<p>Response:</p> <p>PASS/FAIL</p>	
105	<p>We will require the first rent documentation to be issued in April 2019, please confirm you will be able to meet these timescales.</p> <p>YES/NO</p>

	Please provide an outline plan with key milestones required to achieve this date.
Response:	
PASS/FAIL	

ID	2. Design
201	Please describe the approach you would take for redesigning the Association's rent documentation
<p>Response:</p> <p>Max Score 5</p>	
202	Please explain how you utilise business logic and variable data to accommodate variable content in producing documents
<p>Response:</p> <p>Max Score 5</p>	
203	How would any future changes to design requirements be accommodated?
<p>Max Score 5</p>	

ID	4. Experience
401	Please detail any experience of working with Housing Providers to design and produce rent documentation and/or any experience you have with producing financial statements
<p>Response:</p> <p>Max Score 5</p>	
402	Please provide details where a client has delivered added value for money as a result of your work with them.
<p>Response:</p> <p>Max Score 5</p>	

ID	5. Implementation
501	Please describe your approach to delivering a project of this type
<p>Response:</p> <p>Max Score 5</p>	
502	Please outline how you propose to manage the contract, both through implementation and then the ongoing contract term, detailing any handovers of responsibility or support and detailing what your organisation has to offer in terms of the required levels of experience, skills, qualifications and resources.
<p>Response:</p> <p>Max Score 5</p>	

References

Name of customer organisation

Point of contact in the organisation

Position in the organisation

Email address

Telephone No.

Description of contract

Contract start date

Contract completion date

Estimated contract value

Appendix B – Reference Request example

Supplier Reference Questionnaire for Rent Documentation Design & Print

To help us with our procurement process, we'd appreciate you completing this short survey about the service you received from >[insert company name]< it should only take 5 minutes to complete the survey. This will be used as part of our evaluation and will be scored.

1. Please rate your supplier for the following categories:

	Very Poor	Poor	Average	Good	Very Good
Delivery & Quality of Work					
Response Times to issues/questions					
Keeping you informed of progress					
Fulfilment of their contractual obligations					
Quality of account management you receive					
Overall performance of the supplier					

2. If you had your time again would you make the same decision to work with your supplier?

YES/NO/NOT SURE

If you have any further comments you would like to make on the supplier please add them below

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