

**Invitation for Formal Quotation for Structural Surveying**

**Midland Heart Ref: MH321**

**Scope of Procurement**

Midland Heart are looking to procure a **Structural Surveying** contractor to survey to our properties, although the volume of work is not guaranteed. We require a high quality solution for the specified service from high quality providers that deliver a service that is demonstrably focused around the needs of Midland Heart. Suppliers who wish to submit a quotation are requested to review/study the specification contained within this quotation document in detail and ensure that the specified requirements can be met that are stated within the specification and is reflected in your returned pricing schedule.

The Structural Surveying contract work is carried out by two contractors currently with the North and South area of properties split between the two contractors. Lot 1 will comprise of North Midland Properties and Lot 2 will comprise of South Midland properties. Midland Heart invite suppliers to quote for either or both lots when submitting your bids.

The approach for the delivery of the service has been reviewed and engineered that will deliver the most cost effective and efficient service for Midland Heart and its customer delivering Value for Money.

The contract will require the contractor to cover a complete survey throughout Midland Heart property portfolio, including properties in sensitive areas.

The contract for the provision for Structural Surveying is expected to commence 01st August 2015 and will run for 3 years with an option to extend for 1 further year based on supplier annual performance review.

The Midland Heart Service terms and condition will be used for this contract.

The basis of the contract will include:

* To respond to Midland Heart Enquiries in relation to buildings that may have a structural fault
* To assess, diagnose and establish the root cause / problem reporting in clear and concise terminology
* To offer a response to the root cause as may be the case with clear remedial measures
* To be on site when requested to assist the building contractor and ensure that they are working compliantly and in line with the remedial measure required.
* To assist the builder during any moment of uncertainty
* To assist Midland Heart with any enquiries
* To respond via report format complete with clear pictures within 7 days from initial request
* To send in monthly valuations in line with Midland Heart’s Financial Regulations and payment terms
* To attends regular monthly and or quarterly meetings

**Introduction to Midland Heart**

Midland Heart is headquartered in Birmingham and is one of the leading housing group in the country and the largest housing and regeneration business in the Midlands. It operates in 54 Local Authority areas, providing and maintaining homes for more than 70,000 people, managing over 31,000 properties and delivering care and support services to 6,700 customers.

Midland Heart is a not for profit organisation. In 2012/13, turnover was more than £165m, and a surplus of £16.1m.

Midland Heart Limited is the parent of the Midland Heart group and owns all its social housing assets. It has five trading subsidiaries:

* Cygnet Property Management Plc. which holds properties for market rent;
* Midland Heart Development Limited which provides construction related services to the group;
* Prime Focus Regeneration Group limited which provides office premises;
* Prime Focus Finance Limited which is a specialist purpose borrowing vehicle;
* Midland Heart Capital Plc. which is a vehicle used to raise bond finance.

Midland Heart is comprised of three businesses: General Needs Housing, Care & Support and Commercial Operations dealing with leasehold and a range of other housing tenures. It also has a financial interest in around 50 mutual schemes for older persons in which the resident is an owner occupier and the residents are the sole shareholders in the mutual. These entities are not within the scope of this quotation.

Midland Heart’s mission has always been to support the most vulnerable of communities. As part of the mission our vision is to create opportunity, enthuse residents and become one the most efficient providers provide affordable housing and community investment services in the United Kingdom.

We want our customers to be the focal point of everything that we do. We are a business driven by quality constantly looking to innovate and improve on each and every activity we undertake, whether small, large or complex.

To support this vision we have built our business around five key interrelated values to provide us with a unique dynamic and flexible approach.

* **Ambition** – to set new standards for housing management and participate actively sustaining, re-building and developing communities where we manage properties.
* **Imagination** – to transform the lives of our customers by harnessing and integrating the skills of our members.
* **Customer First** – to deliver reliable, right first time, accessible and beneficial services across the group.
* **Empowerment** – to make all stakeholders feel empowered, enthusiastic and passionate about the services we deliver, to devolve responsibility to where it makes the most impact.
* **Courageous** – to continue to be a courageous organisation that takes risks where appropriate and challenge ourselves to work in new ways. To embrace change within working environments to provide transformational services.

In summer 2011, Midland Heart won grant funding to build around 1400 new homes in the period to March 2015. These homes form part of a total of 2,400 homes planned to be built in that period within Midland Heart’s business plan.

Midland Heart has a growth strategy which anticipates growing to 50,000 property units within the next three years and is also planning for a 50% increase in the turnover of their Care & Support business. This growth is expected to come from a combination of organic growth and mergers/stock acquisitions. In addition to the reconfiguration of social care services presents opportunities for housing and care providers and may involve developing new products and entering new markets and selling to new customer groups such as the NHS.

**Specification**

**SPECIFIC PROJECT SPECIFICATION**

The results of the service will be reviewed qualitatively and quantitatively, based on Key Performance Indicators (KPI’s) and any extension of the contract will be based on results.

Regular and annual audits are to be undertaken with reports submitted

The Contracts to be placed with Service Providers will be for a three year period plus one year extension option, subject to continuous performance monitoring and annual performance review. During their life, the Partnerships will need to demonstrate continuous improvement.

The Works are required to be carried out throughout the Contract period in respect of blocks of flats, voids and the like which contain dwellings and offices that are likely to be occupied by customers, leaseholders of Midland Heart .

It shall be noted that the extent of Midland Heart’s Property is likely to vary during the Contract Period. New Schemes may therefore be added to the Contract and the Service Provider will be required to undertake the Works to these Schemes in accordance with the Conditions of Contract. Schemes may also be omitted from the Contract in accordance with the Conditions of Contract.

It is deemed that all suppliers making submission are fully experienced in structural and associated works. The operatives will be skilled and trained accordingly to ensure that all aspects are catered for leading to a high quality and finish to the project in question, and whilst being fully aware of the manufacturers’ recommendations to the use and storage of all materials. They are there to give a clear indication as what is required of the finished product and an indication as to the quality of materials required. In some instances aspects mention in one specification may also be applicable to another.

**Operational Requirement**

The Service Provider must ensure they have fully read through the specifications and that they have allowed for **all items** as required when applying their quotation prices.

**Scope of Works**

The Service Provider will be responsible for the making of appointments, carrying out a Pre-Entry Inspection survey (shown as the “**PEI**” throughout the rest of specification), design, liaison, and customer consultation. The works will include all associated fixtures and finishes and will include all Midland Heart specifications where appropriate. The Service provider will manage the process of the Contractor on the Clients behalf.

**Asbestos**

The Service Provider will be given access to the Asbestos Data Base and will be required to interrogate this in respect of properties nominated for works.

Where a Licensable Asbestos containing material is identified in a property in the vicinity of the proposed works, Midland Heart will arrange for this to be removed by our Asbestos Removal Contractor within a reasonable time prior to commencement of the works on site.

The supplier will not be expected to source a licensed asbestos removal firm under the terms of this contract. All licensed asbestos must be reported back to the Client Representative who will arrange for removal.

**Pre-Entry Inspection Requirements**

The Service Provider shall notify the customers verbally of when surveys are due to commence as soon as possible after the work has been issued from the Client. This will then be confirmed in writing where ever possible before they are due to start via an ICD (Interim Certificate Detail). In situations were customers require time off work, this confirmation shall be made in association with the notice period the individual will need to give their employers and be agreed during the PEI visit.

No works should commence until written confirmation has been received from Midland Heart. This can be in the forma of a contract instruction or simply an email

Any properties identified as in an unsanitary condition, usually at PEI stage shall be drawn to the attention of the Client before proceeding any further. The Client will then contact the customer to request sufficient improvements before the refurbishment process resumes.

Disabled customers shall be identified at pre-entry stage with a simple question enquiring if they have any disability or serious illness/age. Should the answer to the question be in the affirmative, the PEI should not proceed any further at that stage, the customer details and address should be forwarded to the Client for further consideration?

The following are to be considered during the PEI:-

**White Goods:** If any white goods need to be removed, test each appliance as far as possible by switching-on and observing its operation for a short period of time before any are removed to facilitate the works. Any damage/defect noted should be brought to the attention of the Customers and the condition recorded and agreed with photos and in writing.

**Photographic records are always recommended.**

During the PEI the Constructor shall enquire about any intended improvements or purchases that the Customer is intending to make in the period leading-up to the works.

* **Incoming Services:** Record the position of the electric and gas entry supply

pipe/cable and the meter, including height off the floor

* **Consumer Unit:** Note the type, position, size and the height of the existing

consumer unit to determine any implication on the scope of the works.

**No Access Procedure**

The Service Provider shall attempt access to properties for all activities on two separate occasions following initial correspondence. Three full working days shall separate each visit and on each occasion a notice shall be left at the property informing the customer of the visit. There shall be maximum period of one month between the first visit and the third visit to any property to carryout a PEI. The notice shall indicate the date, address, the works involved/the purpose of the visit, the number of the visit and the name and telephone number of the contact to arrange access.

A record or log will be required in order to substantiate any claims and will need to be in line with Midland Hearts No Access Policy.

If after 5 working days from the 2nd visit there has been no contact, the Service Provider shall send a list of the addresses subject to "no access" to the Client and copied to the Client's Representative indicating the date when the visits were made. The notices shall be in the form of duplicate pads with one copy retained by the Constructor and forwarded to the Client with the "no access" list for use in gaining legal access should it prove necessary.

**Programme of Works**

The Service Provider may programme for works in order to aid the contractor and will inevitably be required to make further assessments dependant upon the nature of investigation and may be the result of multiple visits at different times causing disruption to customers.

For property addresses commencing during the month of December and those starting during the 3 - 4 weeks leading up to Easter, do not programme the works without gaining the advanced agreement of the customer that works will be completed to an advanced but not to the fully complete stage by the date when the Service Provider stops work for the holiday

There are no specific Client requirements for the sequencing of the works between different geographical locations or estates, this shall be determined by the Service Provider and outlined to the Client with the quotation return documents and confirmed by the submission of the full Project Programme.

The Service Provider shall provide a programme, which, shall be updated as required indicating the number of jobs intended per week and the actual numbers achieved together with the location of those inspections.

The Service provider shall undertake PEI's sufficiently ahead of organised or commencing work to avoid and delay in the work programme due to the time taken or order and gain the delivery of materials etc.

The Service Provider shall undertake PEI ahead of the contract commencement date for the contract to allow for the work to commence as scheduled. Note: specific addresses identified by the Client for initial commencement and pre-contract PEI's.

The Service Provider shall continually monitor progress, update programme and issue revisions to Client's Representative, incorporating detail of any delay and the measures taken to recover lost progress.

**Standard of Work**

The aim of MH will be to achieve “Zero Defects”.

**Design Costs and Licensing Fees**

The Service Provider will not be reimbursed for the cost of any design work or for any system licensing fees arising out of the contract. All fees etc. must be separately identified in the Price Schedule.

**Monthly Report**

The service provider will be required to attend Monthly Progress Reports detailing information on survey findings, the number of omissions/refusals, Pre-Entry Inspections, making good of defects. Additionally provide information on KPI’s, “No Access Addresses”, Health and Safety, Complaints Made and actions taken to resolve.

**Completion and Handover**

On completion all works of a structural nature, these will be required to be signed off by the approved structural engineer.

**Monitoring**

The Service Provider accepts no responsibility for any orders processed

By the Structural Engineer which have not been authorised or accepted by the Client or designated person(s), where levels of hierarchy exist.

Providers are to act upon written instructions from the Client, and are to pass such information to the specified sub-contractors (if used by the provider) as necessary and act as the Contracting Body’s agent in this respect. Providers acting in this capacity also accept responsibility for all quality; audit, management information and subsequent delivery and invoicing that would apply to the supply.

**Inspection of Documents**

The Client shall have the right at all times upon reasonable notice to inspect such documents and records of the Provider as are reasonably necessary in order to verify the methods by which the provider and the Contracting Body, are being adhered to and to take photocopies thereof. What is ‘’reasonably necessary’’ shall be decided by the Contracting Body and Lead Provider.

**Identification of Sub Contractors**

 No sub contract resources are to be accepted.

**Key Personnel and Access to Information**

The Service Provider must nominate Key Personnel who will regularly meet (and be available for communication at other times) with nominated Midland Heart personnel to discuss management information provided, the contract uptake, the marketing, performance and any other issues that may be highlighted by the data.

Additional personnel, from Midland Heart may be involved from time to time and must be allowed access to all documentation and information relevant to the contract.

**Supply of Management information**

The Service Provider will provide management information, monthly to the Client (or such other alternative body notified to the Provider) and provide Midland heart representative access to their system which details the following in contract term):

**This will also consist of quality, prices, schedules, timescales, completion dates etc.**

Value invoiced overall to the Contracting Body under the contract, sub total to show production value, material value, other allowable (itemised) charges and VAT.

**Pricing**

Midland Heart retains the right to check prices at anytime and review the contract if finding better costs and quality on more than one occasion every 6 months.

**Environment**

The Service Provider along with its sub-contractors is to provide Midland Heart copies of their Environmental policies along with measurement systems.

The Service Provider is to work in partnership with Midland Heart and its OBU’s to help reduce environmental impact, and at the same time meet Environmental accreditations

The Service Provider taking active responsibility for their impact on the environment and the community.

Management Implement performance standards based on internationally agreed environmental, social, and economic requirements that form the cornerstone of sustainability.

Being a responsible Organisation and reliable Service Provider helping Midland Heart to meet its legal obligations and fulfilling our commitments to our customers and other stakeholders.

Develop our Products processes and working method’s in order to continually improve our environmental performance.

Support best environmental practice throughout the supply chain.

Provider to develop and promote a programme of environmental educational activities aimed at customers, colleagues and the wider community.

**Standard of Work**

The Service Provider shall at all times comply with the Quality Standards, and where applicable shall maintain accreditation with the relevant Quality Standards authorization body. To the extent that the standard of work has not been specified in the Contract the Provider shall use the best applicable techniques and standards along with its sub-contractors and execute the Contract with all reasonable care, skill, and diligence.

The Service Provider warrants and represents that all Staff assigned to the performance of the Service shall possess and exercise such qualifications, skill and experience as are necessary for the proper performance of the Services.

The introduction of new methods or systems which impinge on the provision of the Services shall be subject to prior Approval.

**Key Personnel**

Key Personnel shall not be released from providing services without the agreement of the Client, except by reason of long-term sickness, termination of employment and other extenuating circumstances.

Any replacements to the Key Personnel shall be subject to the agreement of the Client. Such replacements shall be of at least equal status or equivalent experience and skills to the Key Personnel being replaced and be suitable for the responsibilities of the person in relation to the services.

**Price Adjustment on extension of the Contract Period**

In the event of an extension being considered beyond the Contract Period the Client would wish to review the charges with the Provider in the six months prior to the expiry of the Contract and would in all instances be in line with the existing contract particulars..

**Health and Safety at Work etc. Act 1974**

The Service Provider shall comply with the Health and Safety at Work etc. Act and all orders, regulations and Codes of Practice issued there under as amended to date.

Comply with all current Statutes, Factories Acts, Health and Safety at Work Act, Code of Construction, (Health & Welfare) Regulations for the Building Industry, and other agreements and recommendations in respect of safety, health and welfare. Take all necessary measures for the protection of people including any sub‑contractor, occupants, visitors, and the public and adjoining property.

**Asbestos Act**

Where the Service Provider knowingly comes into contact with asbestos

products in any form such as boiler and pipe lagging etc they shall comply in

full with all current Asbestos Regulations.

The Contractor Administrator shall be informed immediately of any asbestos contact by the contractor.

**Handover**

On completion of the works to the satisfaction of the Midland Heart or its representative/agent a formal meeting will be arranged to hand over the installations to the Employer and a certificate of practical completion issued.

**Variations**

No variations shall be carried out to the works unless the Client has issued a Contract Instruction authorising as such. No Contract Instruction will be placed without an appropriate quotation

**Pre-Contract Meeting**

The successful supplier shall attend a pre-contract meeting with the Contract Administrators Representative during which the Clients requirements will be outlined, and any queries resolved. The Service Provider will be expected to agree the contract start date and agree all other legal requirements.

**Extension of Contract**

The contract is for three years with an option to extend for a further year and will be held at the quoted prices. If it is not possible to agree prices satisfactorily to both parties for the following years, the contract will not be extended.

**Security**

The Service Provider must administer their own security; Midland Heart will accept no responsibility for materials and plant left on site.

**Travelling Time**

The Service Provider shall include in his quotation for all costs, charges and expenses in respect of travelling time and for conveying workpeople to and from the various sites.

**Customer Management**

Midland Heart places great emphasis on keeping customers fully informed about works that affect them, as this leads to better operation and easing of working relationships between parties. The Service Provider will be required to adhere to this requirement at all times and take an active part in maintaining good customer relations.

Prior to the commencement of any site works the contractor will be responsible for liaising with customers to arrange access, discuss methods of survey works and inform them of any disturbances that may occur during the works.

**Customer Care and Services Specification**

Midland Heart and its members seek to provide a customer centered approach to service specification and delivery.

The successful Bidder’s performance will be monitored throughout the term of the Contract and breach of the Code may lead to termination of the Contract.

Bidders should be aware that Midland Heart and it’s members expects the same high levels of satisfaction with the service provided under any Contract awarded and are enjoyed across all ethnic groups. This will be the subject of regular review throughout the term of the Contract and action will be required where necessary.

:-The service provider will have a procedure for receipt, logging and processing Works Orders including issue of Work to operatives and monitoring all stages of a Works Order from receipt to completion.

:-The service provider will ensure that timely and accurate feedback is provided to Midland Heart and its members on the status of work ordered.

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:-The service provider will have policy and procedures for working in communal areas.

:-The service provider will carry out all required inspections and submit via report to the Client for approval and further instruction.

:-The service provider will help minimise the need for Midland Heart and its member’s staff to pre-inspect work.

:-The service provider will have procedures for dealing with customer complaints, how they can be minimised and how the feedback from complaints can be used to improve service. (This includes customer care and monitoring client satisfaction).

:-The service provider will provide a guaranteed 24-hour, 365 days a year call out service for reactive maintenance/repairs or replacements of any works under taken and within a warranty.

:-The service provider has methods to ensure that all staff have a polite, friendly and respectful attitude to customers, their homes and their property, along with full identification.

**Preliminaries**

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| Names of the Parties and Consultants |
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| **Employer** |
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| Midland Heart Limited  |
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| **Supplier / Service provider** |
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| The Supplier / service provider shall mean the individual or firm or company undertaking the Goods, Services & Works and shall include the legal personal representatives of such individual or of the persons comprising such firm or company and the permitted assignees of such individual or firm or company.  |
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| Location of Sites |
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| Properties which constitute the current schemes/sites are to be covered but which is not exhaustive and will be added to and/or amended as necessary during the term of the contract. |
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| Conditions Affecting Quotation  |
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| The quotation shall remain open for acceptance for twelve weeks from the date of submission. |
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| No amendments shall be made to the text, wording or figures in any of the quotation documents unless specifically ordered by Midland Heart. If any unauthorised qualification or amendment is made it shall not be recognised and the document shall be read and construed as if no amendment had been made. |
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| Advertisements |
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| No advertisements shall be displayed without the written consent of the Employer who shall have power to prescribe the form of any advertisements to which he consents. |
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| Confidentiality |
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| Definitions |
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| The term “approved”, “directed” or “selected” shall be understood to mean the approval, direction or selection of or by Midland Heart. |
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| **Strategic Audits** |
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| Midland Heart would like clearly defined objectives for Bi-Annual Strategic Audits, designed to reveal on an on-going basis the key information we need. These audits will review the below aspects and Implementation plans. |
| **>** costs currently and continually paying.(summary of current spend) |
| **>** Quality and Customer Satisfaction |
| **>** supply chain performance. |
| **>** Business critical items and contingencies in place to address them. |
| **>** Whether current arrangements give sufficient control  |
| **>** On-going environmental impact and ways of minimising, and working with Midland Heart to achieve varying Environmental accreditations. |
| **>** Performance monitoring and measurement. |
| **>** Supplier providing quarterly saving statements. |
| **>** New specific and quantified savings that could be potentially made. |
| **>** Help with removing indirect costs by streamlining our processes |
| **>** Training/Apprenticeships, Health and Safety |
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| **Equal Opportunities** |
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| The Supplier is expected to operate an Equal Employment Opportunities Policy and to employ local labour wherever possible. |
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| **Attendance at Meetings.** |
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| The Supplier or his authorised representative shall attend such meetings as may be held by the Employer to discuss the progress of the contract and shall furnish any particulars and details which may be required in connection therewith. |
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|  Working Hours |
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| Hours are to be agreed with the Midland Heart Scheme Manager. (contractor normal and out-of normal hours to be filled in within Section 5) |
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| **Making Good Defects.** |
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| The Supplier is required to remedy any defect free of charge, in accordance with Midland Heart requirements and to make good any damage caused by the defect. |
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| Defects for critical defected products may need re-supplying/repair within 24 hours.  |
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| Comply with enactments, regulations and working rules relating to safety, health and welfare of work people.  |
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| **Safeguarding the Works against Damage and Theft (Site)** |
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| Whilst on site the Supplier and or its sub-contractors will be responsible for protecting and safeguarding against damage and theft, all stock products stored in relation to Midland Heart or its sites. |
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| Generally |
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| The Supplier shall allow in his tender for complying with all the foregoing clauses and conditions which shall be deemed to be incorporated in and form part of any Contract entered into between the Employer and the Supplier in respect of the Contract Requirements. |
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| **Conditions of Contract** |
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| Midland Heart Service terms and conditions will apply to this contract to the awarded Supplier(s) and/or any sub-contractors they may use.**Supplier Quotation Evaluation** **QUALITY & PRICE** The evaluation of submissions will be on the criteria listed below. The criteria will count for 100% of the overall evaluation with the relevant weightings listed next to each individual criteria stated below. **Award Criteria** The Contract will be awarded on the basis of the following weighted award criteria:

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| **Award Criteria**  | **Weighting**  |
| **Conformance to Specification** Submissions which do not, in the opinion of Midland Heart, adequately meet the Performance Specification will not be marked for the Technical Merit and Price Criteria outlined below and will not be taken forward to any subsequent stages of the Tender evaluation.  | **PASS/FAIL** |
| **Price**  | **60%**  |
| **Technical Merit (Quality)** | **40%**  |
| **TOTAL** | **100%** |

The **Technical Merit** criteria is made up of the following sub-criteria:

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| **1** | **Capability & Capacity**  | **11%** |
| **2** | **Experience**  | **9%** |
| **3** | **Contract Performance**  | **5%** |
| **4** | **Problem Resolution**  | **12%** |
| **5** | **Meeting Deliver Requirements**  | **3%** |
| **6** | **Social Value**  | **Not scored** |
| **7** | **Value Added**  | **Not scored** |

Tenderers may then be taken forward the final stage of an interview. This stage will be used to moderate your scores (+/- 5) at ITT stage by clarifying information provided in your company’s bid.

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| **7** | **Interview** | **Not Scored** |

Technical scores from the Quotation stage will then be added together to give a total **technical score out of** **40%** Which will then be added to the **Price score (out of 60%) to give an overall score of 100%.** **Suppliers invited to the Interview stage will be expected to provide any equipment, consumables and suitably qualified/skilled staff required during this process free of charge.** Midland Heart reserves the right to invite other suppliers, by rank order, to participate in the Interview stage if required. Evaluation criteria will be combination of both financial and non-financial factors and will consider the following areas: **Price** The Price criteria carries a weighting of **60%** out of 100% of the overall achievable score. The supplier must provide an economically sound, innovative and commercially attractive proposal offering outstanding customer service and satisfaction. Please see **Appendix 1** for the pricing schedule to be completed by **ALL** suppliers. **NOTE: There is no guarantee of work for this contract.** A price score shall be calculated for each quotation by reference to the lowest quotation, which is given points score of 60 (60%). One point shall be deducted from each of the other quotes for each percentage point above the lowest in accordance with the following formula:60 x (a/b) = score **Where –** **A = price of the lowest bidder****B = price of the quote being evaluated**Prices must be inclusive of **VAT**. Please see (**Appendix 1**) for the pricing schedule that should be completed and returned as part of your quotation response. The contract price will be **FIXED** for the duration of the duration. Bidders must demonstrate how their proposals represent overall Value for Money and how they will assist Midland Heart with cost initiatives. **Technical (Quality)** The Quality criteria carries a weighting of **40%** out of 100% of the overall achievable score. **All** bidders must answer the following set of question listed below. **Please take the opportunity to fully describe the service and approach you are able to offer including, wherever possible practical examples.** Each question must be answered in **no more than 2000 words.** **Capability & Capacity (11%)** Please describe how you intend to deliver this contract with reference to the requirements outlined in the Specification and Scope of Procurement outlined within this document. In your response please include details of:* Call-out response times
* Health & Safety measures applicable to this type of contract
* Quality control measures & management systems for controlling and reporting & storing data
* What Lots you intend to quote for (Lot 1 – North and Lot 2 – South)
* What your customer engagement strategy and how you intend to engage the customers to ensure all surveys are carried out to a high standard that is customer focused
* How you plan to capture all the survey data

**Experience (9%)**Please provide details of the knowledge and skills that your organisation and the personnel who will be directly involved in this contract, and why you feel you would make the ideal partner for Midland Heart. In your answer please also include details of:* Your management and supervision structure
* Experience, qualifications and time allocated of named personnel who will be directly involved this contract
* Your organisations experience in dealing with similar types of contracts (please include a short description of the contract, value, duration and point of reference within the last 2 years).
* Resources available to this contract

**Contract Performance (5%)** Have any of the following circumstances occurred on any contracts involving your organisation during the last 3 years:* A contract terminated on your employment determined
* A contract not renewed for failure to perform to the terms of the contract
* Withdrawal from a contract prematurely
* Outstanding claims or litigation against your organisation
* A financial penalty/deduction imposed

**Problem Resolution (12%)** * What procedures would you instigate in order to deal with any problems that arise throughout the projects before they become disputes or cause for concern?
* How will you control costs to ensure budget compliance?
* How will you meet emergency call out situations, etc?
* With regards to Supervisory standby, communication and response times and on costs, whilst work is in progress?
* How will you report back any problems found & what are your procedures to do so?
* What are your Escalation procedures?

**Meeting Delivery Requirements (3%)** Please describe how you intend to deliver this contract in line with your mobilisation and delivery plan. In your response please state how:* How you may deal with geographical distancesHow you will manage any issues across the stock with regards to surveys and informative information towards the remedial contractor.
* What is your proposed mobilisation and delivery plan

**Social Value (not scored)** Midland Heart is not just a social housing provider. We have a successful track record of delivering services that support the quality of life of our customers and the wider community.  As part of this agenda, we deliver a range of projects and initiatives that help to improve skills levels and create employment and enterprise opportunities, all of which encourage independence and lead to thriving communities.We are taking an increasingly active role in meeting the needs of people not in employment education or training with a particular emphasis on engaging & involving our own customers in relation to their employment and skills requirements.1. Please give examples of your involvement in each of the following,

including what your exact role was in each of the activities:* generating employment and training opportunities for long-term unemployed people;
* providing training opportunities for young people and retaining them after the completion of training;
* equal opportunities recruitment procedures.
1. Which of the examples you have cited have been more successful, and which have been less successful, and why?
2. How will your experience translate into this contract? E.g. will you require additional staff, if so what types of jobs, skills and training opportunities will be created, how will new staff be recruited, how might these opportunities be made available to Midland Heart customers.
3. We want to develop a Charter with successful partners, the aim of which is to set out a commitment to work jointly, openly, collaboratively and constructively with new contractors to maximise access to jobs and skills opportunities for local unemployed people and our respective workforces. **Please confirm if you are willing to develop such a framework if successful.**

**Value Added Service (not scored)** Please provide ideas/suggestions your organisation has to improve the efficiency of the services to be provided to Midland Heart within your response. Please provide details of any savings this may achieve. **Pricing Schedule**Please refer to Appendix 1 for the pricing schedule to be completed by **ALL** suppliers who wish to quote for this contract. **Supplier Questionnaire (Pass/Fail)** **All** suppliers must complete the following supplier questionnaire in full as a mandatory requirement of their quotation response. **This questionnaire is set an Pass/Fail criteria**. Please provide the following information. These questions have been designed to evaluate your tender in line with the criteria being used for the Tender Assessment.**Tender Contact Details**

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| --- | --- |
| Organisation name: |  |
| Postal address: |  |
| Contact name: |  |
| Telephone no: |  |
| Email address: |  |

The above person will be used by MIDLAND HEART as the principal point of contact for all correspondence regarding this Invitation to Tender.**Business Probity**- Pass/Fail

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | Is the entity bankrupt or being wound up, where its affairs are being administered by the court, where it has entered into an arrangement with creditors, where it has suspended business activities or is in any analogous situation arising from a similar procedure under national laws and regulations? | Yes | No |
| 2. | Is the entity subject of proceedings for a declaration of bankruptcy, for an order for compulsory winding up or administration by the court or of an arrangement with creditors or of any other similar proceedings under national laws and regulations? |  |  |
| 3. | Has the entity been convicted by a judgement which has the force of res judicator (or similar) in accordance with the legal provisions of the country of any offence concerning his professional conduct? |  |  |
| 4. | Has the entity been guilty of grave professional misconduct proven by any means which the contracting authorities can demonstrate? |  |  |
| 5. | Has the entity failed to fulfil obligations relating to the payment of social security contributions in accordance with the legal provisions of the country in which he is established or with those of the country of the contracting authority? |  |  |
| 6. | Has the entity failed to fulfil obligations relating to the payment of taxes in accordance with the legal provisions of the country in which he is established or with those of the country of the contracting authority? |  |  |
| 7. | Is the entity guilty of serious misrepresentation in supplying the information required under this Section or has not supplied such information? |  |  |
| If you answered 'Yes' to any of the questions in this section, please give details. |
| 8. | Is the company registered under the Data Protection Act? If yes please advise certificate/registration number: |  |  |
| 9. | Is your company affiliated or associated with any other company, which is capable of tendering for this contract? If yes please supply details? |  |  |
| 10. | Is your organisation expecting to use third parties to provide some services? If yes, please state organisation name, address & contact details, service provision responsibility. |  |  |
| 11. | Do you have a business continuity plan? If yes please attach a copy to tender response. |  |  |

**Financial Standing-**Score available – Pass/FailSuppliers annual turnover must be at least two times greater than or equal to the total value of this contract or applicable lot(s) (i.e. the value of this contract to be successful in this PQQ.**Please provide the last 3 years audited accounts** **Please note that Midland Heart will use Experian to download credit reports for all participating supplier/s.** **Turnover & Insurance**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Last Year | 2nd Year | 3rd Year |
| Company Annual Turnover |  |  |  |
| Gross Profit |  |  |  |
| Net Profit before Tax |  |  |  |
| Net Asset Value |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Insurance | Overall Value | Value per incident | Expiry Date | Insurer | Policy Number |
| Professional Indemnity £500,000 |  |  |  |  |  |
| Employers Liability £5million |  |  |  |  |  |
| Public/Product Liability £5million |  |  |  |  |  |

\*Please include Insurance Certificates in your submission**References -** Score available- Pass/FailPlease include 2 references with your bid submission using the template below. These should be current or previous customers that you have worked with within the last 2 years and should be from a similar organisation(s) to Midland Heart. **NOTE: No references from Midland Heart will be accepted. You must submit 2 references** **Reference 1** **Reference request****MIDLAND HEART LTD**Referee: Applicant: **Return Date : 24th July 2015**

|  |  |  |
| --- | --- | --- |
| Has this organisation undertaken a contract/agreement for you which could be classified as delivering a Stock Condition Survey Service? |  |   |
|  |  |

 |
| If answered “YES” to the above, please could you provide the following information?

|  |
| --- |
| Project/contract description and scope of duties carried out |
|  |
| Contract Value (Per annum) |  |
| Date of commencement of contract |  |
| Period of contract |  |
| Geographical spread of contract |  |
| How many contracts of the above nature has this organisation undertaken for you? |  |
| The headings below show various aspects of the organisations performance. Would you please complete the sections below by placing a tick in the appropriate box to indicate your assessment of the organisations performance on the contract(s) you describe above. You are encouraged to make additional comments in the comments column.  |
|  |  | **Excellent** | **Good** | **Average** | **Poor** | **N/A** | **Comments** |
| 1 | The ability to comply with the contract specification in relation to service delivery? |  |  |  |  |  |  |
| 2 | The ability to demonstrate an effective management of the service. |  |  |  |  |  |  |
| 3 | The Ability of key staff i.e. nurses, contract managers. |  |  |  |  |  |  |
| 4 | The ability to achieve the deadlines/ performance targets you specify? |  |  |  |  |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 5 | The ability to manage the requirements of the contract  |  |  |  |  |  |  |
| 6 | The ability to cope with a diverse service requirement? |  |  |  |  |  |  |
| 7 | Communication links with client officers. |  |  |  |  |  |  |
| 8 | The ability to meet your expectations in terms of the quality of the service delivered? |  |  |  |  |  |  |
| 9 | The ability to demonstrate added value initiatives? |  |  |  |  |  |  |
| 10 | The organisation’s track record for submitting invoices, key performance data and other essential returns? |  |  |  |  |  |  |
| 11 | Organisation’s overall performance |  |  |  |  |  |  |
| Would you recommend the employment of this organisation again? |  |  |
|  |  |
| Please make any comments you may feel are appropriate in the space provided below. (Use an additional page if you require)  |
|   |

Once again, I wish to thank you for your co-operation in this matter. I would welcome the return of the completed reference by the time detailed above. Your reply will, of course, be treated in the strictest confidence. I would also be obliged if you could provide the following details:Name: Designation: Telephone number: Email address: For and on behalf of: **Reference 2** **Reference request** **MIDLAND HEART LTD**Referee: Applicant: **Return Date :**

|  |  |  |
| --- | --- | --- |
| Has this organisation undertaken a contract/agreement for you which could be classified as delivering a Stock Condition Survey Service? |  |   |
|  |  |

 |
| If answered “YES” to the above, please could you provide the following information?

|  |
| --- |
| Project/contract description and scope of duties carried out |
|  |
| Contract Value (Per annum) |  |
| Date of commencement of contract |  |
| Period of contract |  |
| Geographical spread of contract |  |
| How many contracts of the above nature has this organisation undertaken for you? |  |
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| Project/contract description and scope of duties carried out |
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|  |  | **Excellent** | **Good** | **Average** | **Poor** | **N/A** | **Comments** |
| 1 | The ability to comply with the contract specification in relation to service delivery? |  |  |  |  |  |  |
| 2 | The ability to demonstrate an effective management of the service. |  |  |  |  |  |  |
| 3 | The Ability of key staff i.e. nurses, contract managers. |  |  |  |  |  |  |
| 4 | The ability to achieve the deadlines/ performance targets you specify? |  |  |  |  |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 5 | The ability to manage the requirements of the contract  |  |  |  |  |  |  |
| 6 | The ability to cope with a diverse service requirement? |  |  |  |  |  |  |
| 7 | Communication links with client officers. |  |  |  |  |  |  |
| 8 | The ability to meet your expectations in terms of the quality of the service delivered? |  |  |  |  |  |  |
| 9 | The ability to demonstrate added value initiatives? |  |  |  |  |  |  |
| 10 | The organisation’s track record for submitting invoices, key performance data and other essential returns? |  |  |  |  |  |  |
| 11 | Organisation’s overall performance |  |  |  |  |  |  |

If answered “YES” to the above, please could you provide the following information?

|  |
| --- |
| Project/contract description and scope of duties carried out |
|  |
| Contract Value (Per annum) |  |
| Date of commencement of contract |  |
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**Questions or Clarifications**

If you have any questions or points of clarification about the contents of the quotation document or the services that are to be provided, please clearly state the project title above and submit these in writing only by email to **karl.baker@midlandheart.org.uk** by the date shown below in the section under **“Timetable for Quotation and Award of Contract”** MIDLAND HEART will not answer any questions received via telephone and will not answer any questions received after this date. Any questions received will be answered and circulated to all suppliers, although MIDLAND HEART will not disclose the identity of the supplier who asked the question.

**Completing your Quotation**

Please return all quotation documents as listed below. Return of

quotes should be at the time and on the date specified in **“Timetable for**

**Quotation and Award of Contract”.** Any comments

pertaining to the information supplied by you may be made in a covering letter and

returned with the quote. No alteration shall be made to the form of quote to the

schedules, appendices, specification, conditions of contract or any other part of t

the quotation documents supplied.

**Submission of tender –**

When submitting your quote please **email to**

**karl.baker@midlandheart.org.uk** and any accompanying

documentation by the date shown below in **“Timetable for Quotation and**

**Award of Contract”**Please clearly state the name of the contract and Midland Heart reference number (which can be found on the first page of this document).

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**Timetable for quotation and award of Contract**

The intended timetable will be:

|  |  |
| --- | --- |
| **Activity:** | **On (Date):** |
| Quotation issued  | 29/05/2015 |
| Tenderers must submit questions and comments regarding tender documents (via e-mail to karl.baker@midlandheart.org.uk(any questions after this date will not be answered)) | 12/06/2015 |
| Midland Heart (Karl Baker)responds to questions and comments via e-mail to all tenderers | 17/06/2015 |
| Quotation closes and emailed to karl.baker@midlandheart.org.uk | 24/06/2015 |
| Proposals evaluated | 01/07/2015 |
| Provisional interview / site visit dates (suppliers need to keep these dates free) | 02/07/2015 |
| Bidders notified of contract award | 10/07/2015 |
| Contract signing | 16/07/2015 |
| Contract to start | 01/08/2015 |