

**Contract for:**

**THE PROVISION OF AN AUTOMATED CONTACT SOLUTION**

**ITT Schedule 1**

**Client: Your Homes Newcastle Limited**

**Specification and Scope of Work**

**Background, Specification and Scope of Works**

**1. Introduction:**

Your Homes Newcastle (YHN) was established in 2004 to manage homes on behalf of Newcastle City Council. As an Arms-Length Management Organisation (ALMO), YHN is owned and controlled by Newcastle City Council but operates at arms-length, with its own business plan, governance structure, workforce, operational procedures and premises.

Your Homes Newcastle (YHN) currently manages almost 27,000 general needs properties: approximately 26,300 on behalf of Newcastle City Council (NCC), and almost 700 which are owned by Leazes Homes. YHN also manage approximately 1,500 leasehold properties on behalf of Newcastle City Council.

As well as being one of the largest ALMOs in the country, YHN are one of the most diverse in terms of the range of services we deliver. YHN employ over 850 staff.

Our statement of purpose:-

* Delivering great services, enabling people to thrive in great communities, supporting a great city

Our vision for 2020:-

* We will be high performing, innovative and focussed on providing quality housing management and support services. We will make the money deliver across everything we do while continuing to create positive outcomes for our customers

Our objectives:-

* Keep the housing stock decent, and neighbourhoods clean and safe
* Collect the rent and let properties efficiently
* Promote health and wellbeing and support vulnerable people to enjoy independence

Our structure:-

* In October 2015 we established a new company structure. Asfaleia Limited is our charitable subsidiary and Abri Trading Limited is our trading subsidiary

Further information about Your Homes Newcastle can be found at our website [www.yhn.org.uk](http://www.yhn.org.uk)

**2. Background:**

YHN have successfully piloted the concept of automated dialling across various areas of the business, including arrears recovery, repairs and maintenance satisfaction, ad-hoc customer information campaigns and, Leazes Homes properties.

Historically a significant amount of officer’s time has been spent calling customers that have resulted in abortive contacts and unnecessary time spent on call preparation. YHN are keen to automate dialling to maximise effective use of our officer’s time and, provide the opportunity to run scheduled campaigns outside of normal working hours to enable us to contact our Customer contact at the most effective time.

We now wish to procure a provider to supply an automated, cloud-based, dialling system that operates independently across various systems for both Your Homes Newcastle and, Leazes Homes Limited.

By procuring an automatic dialling system (as we have deemed it), YHN aim to;

* + Make every contact count
  + Utilise an effective performance management tool
  + Improve operational efficiency
  + Improve contact rates
  + Contribute to income maximisation
  + Contribute towards improved service delivery

With the potential benefits for the Organisation of;

* + Released capacity, enabling the organisation to redirect resource
  + Gain a better understanding of our customer’s needs
  + Improved customer experience
  + Optimising customer contact by using the right channel at the right time
  + Enhanced performance information

**3. Specification and Scope of Works:**

YHN has a portfolio of approximately 26,000 properties.

It is envisaged that the solution provided by this contract will be used to contact;

* Around 5,000 customer’s unique customers per month for outbound calling in relation to income recovery, although this can vary from month to month.
* Around 100,000 customers to gather customer satisfaction information in relation to responsive repairs
* Around 10,000 customers for cascading information e.g. lift out of order

Around 100,000 customers post event feedback (these may be con-current)

YHN are seeking relevant, complete tenders for a specialist solution to enable our Officers to establish effective customer contact on behalf of YHN and Leazes Homes. The solution should intelligently interpret data and signpost the call to the appropriate service area.

Tenderers acknowledge that the value of the framework is indicative and no guarantee is given by YHN that these values shall be achieved. . However, they may also be exceeded. These indicative values are given solely to enable Tenderers to assess whether the volume of work likely to be required under the contract is within their capacities and capabilities.

The successful Tenderer will;

* Fully meet with requirements of the specification and provide a cost-effective solution
* Manage the Contract and work in collaboration with YHN
* Be fully compliant with all applicable legislation and, have a robust quality control / quality assurance process to evidence compliance
* Provide clear, auditable processes

YHN would like to invite tenders from experienced automated dialling providers, with previous experience of delivering similar project requirements to those detailed in this specification, for organisations of a similar size and diversity.

Tenderers will note that YHN is not a technical expert in this area. Any statement of service requirements is an analysis of the perceived requirements of YHN. If a Tenderer considers that one or more stated requirement is not necessary then it should highlight so and fully explain why. YHN will not be held liable for the absence of any stated service requirement in the final tender, as accepted.

YHN’s requirements for the tool are detailed below.

**Key Functionality**

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| Functionality:- | Essential / Desirable |
| 1. Automated outbound calling;    * + Transferring the call direct to an operator immediately on answered calls      + Ability to leave a bespoke recorded message or send SMS for unanswered calls      + Ability to integrate with YHN telephony to bypass interactive voice recording | Essential  Essential  Desirable |
| 1. Operate bespoke campaigns using customer data provided by YHN in a secure format including;    * + Contact campaigns where customers are transferred to a call handler      + Deliver information to customers via bespoke message campaigns      + Collect real-time customer survey information      * + - Collect retrospective customer survey information      * + - Run multiple campaigns simultaneously | Essential  Essential  Desirable  Essential  Essential |
| 1. Ability for YHN to self-manage areas of the system;    * + Functionality to allow users to configure the system to operate within available resources      + Ability to exclude or suspend contacts for a specified period on a bespoke basis      + Extract performance data into an excel format      + Functionality to amend/record IVR messaging internally | Essential  Essential  Essential  Desirable |
| 1. Performance management;    * + Provide real-time performance information which delivers insightful management information via an interactive dashboard.      + Configurable to meet the demands of a number of bespoke campaigns and service demands.      * + - Extractable into various formats including excel and PDF | Essential  Essential  Essential |
| 1. Additional requirements;    * + Pushes calls out at the appropriate levels to match specified resource      + Flexibility to react to immediate changes      + Ability to run multiple campaigns simultaneously      + Data cleansing/validation functionality      + Fully comply with current regulations including but not limited to Ofcom regulations and maintain compliance should regulations change      + Capable of supporting and be fully licensed for con-current users      + Compatible with relevant systems , e.g. Windows operating system and CS1000 telephony      + Ability to provide a visible contact history in YHNs CRM System (Lagan xx), to include both successful and attempted contacts.      + Route calls to multiple locations utilising logic to identify the appropriate call handler      + Intelligently recognise when customers have been contacted and build in logic to mitigate multi contacts across campaigns, as specified by YHN      + Intelligently recognise when customers have been contacted and build in logic to omit customer upon successful transfer      + Securely manage data extracts and transfer of data      + Calls prioritised using the data extract intelligently in line with YHN requirements      + Ability to utilise SMS contact as an alternative method of contact | Essential  Essential  Essential  Essential  Essential  Essential  Essential  Desirable  Essential  Essential  Essential  Essential  Essential  Desirable |

\*\*\* Please note that all Tenderers must provide full details of any dependencies in terms of hardware or software requirements, (for example servers and server software licences, etc) \*\*\*

**4. Tender Submission:**

When you are submitting your Tender electronically by means of Your Homes Newcastle’s e-tendering system, the Tender should be submitted in accordance with its conditions as stated within ITT Part 2 – Summary Instructions and Details of Contract document.

**5. The Contract:**

YHN will contract only on the accompanying terms and conditions. The work and services will be charged and paid against the prices submitted and agreed in the pricing schedule, for the initial Contract term.

Tenderers should submit one electronic copy of their Tender via the web portal [**https://procontract.due-north.com**](https://procontract.due-north.com), which is compatible with Microsoft Office 2010 or Acrobat/PDF. Your tender submission should be uploaded onto the portal **no later than 12.00pm, noon on Friday 9th February 2018.**