

# **Invitation to Tender**

**Provision of a Monitoring and Response  
Service to Sheltered Schemes 2019 - 2022**

Issued 30/01/19

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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

This document sets out the Association's requirements for the provision of a Warden Call Monitoring and Response service and provides information about the Association and the key criteria for this contract.

Tenderers are to note that the Association has in place a contractor who provides repairs and maintenance of the warden call systems and this runs to March 2020. The Association is therefore looking for a Supply Partner to provide the monitoring and response service.

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.

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.

Any queries should be placed in writing (e.g. email) and directed to Joanne Harrison, Procurement & Contracts Coordinator, email: joanne.harrison@lfha.co.uk. **The latest date for the receipt of queries is 18/02/19.**

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	30/01/19
Deadline for submission of Clarifications	18/02/19
Submission of tenders	27/02/19
Evaluation of tenders	27/02 – 15/03/19
Internal Board approvals	25/03/19
Notice of Award	26/03 – 29/03/19
Appoint contractor / Contract signature	By 05/04/19
Mobilisation	05/04/19 – 29/05/19
Contract start date	30/05/19

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

## 4.0 Brief

4.1 The Association has schemes in the following locations:

### Sheltered Schemes

- |                        |                    |
|------------------------|--------------------|
| • Whincup Gardens LS10 | 26 flats           |
| • Oaktree Court LS9    | 20 flats           |
| • Greenview Close LS9  | 12 bungalows       |
| • Cleveleys Court LS11 | 37 flats           |
| • Cragside Close LS5   | 28 flats & 1 House |
| • Memorial Drive LS6   | 34 flats           |
| • Maltings Court LS11  | 26 flats           |
| • Fewston Court LS9    | 38 flats           |
| • Ingle Court LS27     | 34 flats           |

Total Sheltered	254 units
-----------------	-----------

Cat 1 Properties in Wakefield (monitoring only)

Sycamore Close WF11	9 units
Hastings Grove WF2	21 units
Total Cat 1	30 units

### 4.2 Maintenance

The Association has in place a contractor who provides a 24 hours a day, 7 days a week responsive repair, replacement, and maintenance for the warden call systems that are in place within the Association's stock.

### 4.3 Monitoring & Response

The Association requires a supply partner from 30<sup>th</sup> May 2019 to 31<sup>st</sup> March 2020, with optional extensions of two further one year periods.

### 4.4 Equipment

The systems we currently use in our schemes are Tynetec Advent. Across the schemes listed at 3.1 there are approximately 300 units.

### 4.5 TUPE

Please note that our incumbent has advised that TUPE will apply to this contract should it be transferred to another contractor. Details have been provided at Appendix B. As a matter of law, any TUPE transfer shall be arranged directly between the outgoing and incoming contractor. Tenderers shall ensure their submitted pricing adequately covers any costs the incoming contractor may incur. No further increases as a result of TUPE costs will be applicable.

4.6 Through this tendering exercise, for the provision of Warden Call Monitoring & Response, the Association would like to appoint a Partner who shall offer throughout the 3 contract period:

- Complete supply chain management solution
- Best Value for money
- Comprehensive management information
- Process improvement through innovation

- High customer satisfaction
- Consolidated monthly invoices
- Advice on any legislative requirements related to the contract

#### 4.7 Performance Reviews

The Association will hold annual performance reviews with the Partner. The Partner will send the appropriate personnel including the Account Manager to each review with the Association which shall focus in detail on the service delivered. Review meetings shall be at the intervals and at a venue to be determined by the Association. For the avoidance of doubt, attendance at such meetings will be at no additional cost to the Association.

#### 4.8 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. That is to say that the rates may not be increased by the tenderer from year 1 of the agreement to years 2 and 3. An escalation rate is to be agreed for the optional extension years.

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

### 5.0 Key Performance Indicators (KPI's)

Please refer to Appendix A

### 6.0 Evaluation of Tender Submissions

- 6.1 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.
- 6.2 Award will be based on the most suitable solution and most economically advantageous tender received, where Price tendered accounts for 50% of the overall score and Quality accounting for 50%.
- 6.3 The scoring mechanism is as follows:

#### i. **Pricing: (50% 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 50% 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 (50% of the overall score)**

This measures the responses to the Quality Questions set and will be scored in accordance with the table below:

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

The responses to the questions should be strictly restricted to the page count identified. Responses will only be evaluated up to the specified page count per question. Text that exceeds the specified page count will be discounted. 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** will be awarded the full 50% available. The remaining Tenderers will be awarded a percentage score based on the following calculation.

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

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

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

## 7.0 Terms of Appointment

- 7.1 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.
- 7.2 Appointment will be on the basis of a 3 year contract (end date 29/05/22) with an optional extension up to a further 2 years to 29/05/24.
- 7.3 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. Tenderers are to note the specific terms at section 8 below.
- 7.4 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.
- 7.5 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.
- 7.6 The Association does not guarantee any award of work or any minimum payment to the Partner under this Agreement.
- 7.7 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:
  - (i) reduces or reallocates any amount of works awarded to the Partner; or
  - (ii) does not award any work to the Partner under this Agreement.

## 8.0 Terms and Conditions

- 8.1 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.
- 8.2 Any variations to the fee due to fundamental changes in the nature of the project shall be by negotiation between the parties.
- 8.3 It is expected that the Contractor will maintain the following insurances at Contract award:  
  
Employers Liability Insurance for a sum insured of not less than £5,000,000  
Public Liability Insurance for a sum insured of not less than £2,000,000  
  
The Tenderer will supply the Association with full particulars of such insurance to accompany their Tender submission.
- 8.4 Information to be provided by the Supply Partner to the Association  
  
The Supply Partner shall inform the Association in writing of any oral or written complaint the Supply Partner's staff makes to the Supply Partner regarding concerns over working practices at any of the



establishments or any concerns relating to health and safety, safeguarding and professional boundaries.

Any such notification should be made as soon as possible but no later than 3 working days from the day on which any oral or written complaint is made to the Supply Partner. The Supply Partner will give such information and assistance as the Association may request, and within any timeframe requested by the Association, in order to investigate any such complaints. All such notifications should be directed to the Scheme Manager in the first instance or where due to the nature of the complaint it is not appropriate to do so, the Supply Partner must notify the Head of Customer Services or HR Manager of the Association.

## 8.5 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.

## 9.0 Submitting your Tender Proposal

- 9.1 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.
- 9.2 The tenderer must acquaint and satisfy themselves with all conditions likely to affect the execution of any of the Services.
- 9.3 The Association will not be liable for any expenses incurred by the tenderer in the preparation of its Tender.
- 9.4 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.
- 9.5 The tenderer shall complete the Form of Tender in respect of this contract. Please do not amend the format of this form.
- 9.6 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.
- 9.7 Tenderers **must** submit a **hard copy** of their response to the Association.
- 9.8 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.
- 9.9 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 that need a signature will require the courier to call 0113 3861106 or enter extension 1503 / 1504 at the entrance intercom to obtain a signature. A letterbox is available 24/7 for non-signed for deliveries, positioned to the right of the main doors as pictured:**



- 9.10 Proposals must be received by Midday 27/02/19 by post to Joanne Harrison – you must use the Tender return label on page 19 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.
- 9.11 Please enclose a hard copy that is signed, and a soft copy on CD / USB stick.
- 9.12 Late submissions will not be considered.
- 9.13 Failure to comply with these requirements may invalidate your tender.

## **10.0 Supporting Documentation Checklist**

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

- (i) Use the Return Label – page 19
- (ii) The Form of Tender
- (iii) Completed Pricing Matrix
- (iv) Response to Quality Questions
- (v) Signed Certificate of Non Collusion
- (vi) Your Terms & Conditions
- (vii) Copies of Insurances (Section 8)
- (viii) Soft copy of the entire tender

## 11.0 Quality Questions

### 11.1 Customer Service (Weighting = 2. Max Score 5 x 2 = 10). Maximum 1 side of A4

- (i) Leeds Federated prides itself on making our services accessible to a diverse customer range. Can you outline how you will ensure the service you offer is equally accessible?
- (ii) Many customers will be vulnerable and have multiple needs; can you outline your experience of dealing with such customers?
- (iii) What is your procedure for dealing with customer complaints, detailing how they can be minimised and how the feedback from complaints can be used to improve the customer experience in the future?

### 11.2 Collaborative working (Weighting = 2. Max Score 5 x 2 = 10). Maximum 2 sides of A4

- (i) This service will require interaction with other agencies (e.g. Social Services, Carers, Emergency Services etc.). Can you outline how your organisation would ensure there is a good working relationship with other organisations?
- (ii) Can you outline your escalation policy to deal with any issues which may arise with LFHA or another supplier?
- (iii) Outline the process you would follow to inform LFHA staff of a visit to site following a call from a customer.
- (iv) We aim to cover all absence within the current staff team but occasionally due to sickness this isn't always possible. Would you provide short notice relief cover on schemes?

### 11.3 Performance Management (Weighting = 2. Max Score 5 x 2 = 10). Maximum 1 side of A4

- (i) Describe how you will approach the mobilisation period to ensure a seamless transition with zero impact on the services provided.
- (ii) What is your approach to achieving KPI targets and customer satisfaction? (details of KPIs are included in Appendix A)
- (iii) Describe how you would address failing KPI's in service delivery.

### 11.4 Data Protection (Weighting = 2. Max Score 5 x 2 = 10). Maximum 1 side of A4

- (i) How do you manage client information to ensure you comply with the General Data Protection Regulation (GDPR)?
- (ii) How do you ensure customer information is kept accurate and up to date?

**11.5 Staffing / Resources (Weighting = 2. Max Score 5 x 2 = 10). Maximum 2 sides of A4 plus org chart.**

- (i) Please provide an organisation chart for the team providing this service and describe your proposed procedures (including escalation path), to include:
  - 11.5.i.1 What induction process and ongoing customer services training is provided to your staff?
  - 11.5.i.2 Details of staff training including any recognised customer service training. Please specifically detail your processes for Safeguarding training, referrals, reporting and recording.
  - 11.5.i.3 Details of how staffing would be structured i.e. dedicated staff for each contract or “floating staff” depending on rotas.
  - 11.5.i.4 Staff hierarchy: whether there is a Single Point of Contact for LFHA and details of the escalation points within the organisation structure.

**11.6 IT (Weighting = 2. Max Score 5 x 2 = 10). Maximum 1 side of A4**

- (i) How will you ensure that your service is available 24/7? Please provide details of your business continuity and IT support plans.
- (ii) What IT support will your staff have whilst working on the Leeds Fed contract?
- (iii) Please provide details of any online facilities that you have in place which will allow LFHA staff access to view all logged calls.

**11.7 Maximum marks available for Quality = 60**

11.8 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, although the references will be obtained to give assurance / confidence in the tender responses.

- (i) Company details: Company Background, services provided and location of base.
- (ii) Dates and details of last audit.
- (iii) Referees: minimum of 2 referees.
- (iv) Contact details for follow up communication regarding your tender

## 12.0 Pricing Matrix

ITEM	WARDEN CALL MONITORING & RESPONSE			
		Per month (£) Years 1 - 3	Per hour (£) Years 1 - 3	Escalation Rate Year 4 & 5
1	MONITORING			
2	RESPONSE			
3	RATE FOR EMERGENCY STAFF COVER			

## 13.0 Form of Tender

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

### **TENDER FOR: Warden Call Monitoring & Response**

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 27/02/19
- (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: \_\_\_\_\_



## 14.0 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):

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Date: \_\_\_\_\_

## Tender Return Label

# TENDER – DO NOT OPEN

Tender Title: **Warden Call Monitoring & Response**

Return Date: 27/02/19

Deadline for Return: Midday

Leeds Fed contact: Joanne Harrison – 0113 3861106

Asima Shad – 0113 386

To: **Joanne Harrison**  
Leeds Federated Housing Association  
Arthington House  
30 Westfield Road  
Leeds  
LS3 1DE



Couriers to use keypad ext. 1503 / 1504  
for signatures 08:30 – 17:00

Postbox (as pictured) available 24/7.

Positioned to right of main doors.

This label **MUST** be used to submit your tender

There must be **no other identifying markings** anywhere on the envelope whatsoever

LEEDS FED USE ONLY

**Date received:**

**Time Received:**

**Initials:**

**It is Leeds Federated policy not to consider LATE tender submissions**

## 15.0 Appendix A – Specification

The appointed Service Provider(s) will be required to adhere to the following:

Resident details	Call handling
Call review function	Notes creation facility
Voice reassurance messages	Call prioritisation
General	Incorporation of ordinary calls
Caller line identity	Scheme auto test facility
Location identification	System resilience
Software ownership	Management report
Call analysis reports	Disaster recovery

The monitoring/response centre will be expected to work with the Association to ensure relevant tenant details are provided, to ensure they can attend to the call out in as short a time as possible.

### • Resident Details

The monitoring system should contain key details of the resident(s) including name, age, key information and notes, the property including address, telephone number and equipment type, the contacts including type, name, and telephone number should be immediately apparent to the system user upon selection of the resident record card. The system should support drill down from the record card to supplementary resident and property details.

The information required to be recorded and displayed for each resident is:

- i. Title
- ii. Forename
- iii. Surname
- iv. Date of birth
- v. Age (with auto increment on birthday)
- vi. General note
- vii. Telephone Number
- viii. Ethnic Origin
- ix. Gender
- x. Other key information.

The information for each property should include:

- xi. Full postal address
- xii. Ownership
- xiii. Equipment installed – e.g. pendant, fall detector, flood detector etc.
- xiv. Key safe code

The information for each contact shall include:

- xv. Name
- xvi. Address
- xvii. Type of contact
- xviii. 3 possible telephone numbers
- xix. E-mail address

- **Call Handling**

A description of the essential parts of call handling will be needed and though not exclusive should include the following information:-

- The records relating to residents from which calls are received should be automatically and speedily retrieved upon selection of the call from the call waiting list and prior to speech paths being opened.
- Service Providers should indicate their expected speed of response from time of call to speaking to the tenant calling.
- A speech path should be automatically established with the caller. There should be the ability to increase the volume to the caller under the control of the system user.
- The facility should exist to configure the system to initiate speech communication at maximum volume to specific residents.
- The service should have in place a protocol that is flexible, and could accommodate contacting friend/family first if the tenant desires as well as or rather than the mobile responder, (except in emergency when emergency services should be contacted first.
- Where it is known that another language is required for a particular resident, the service should have resources to quickly provide interpreters to cater for this need.
- When receiving a call from a scheme resident it must be possible to select another resident on that scheme without having to terminate the first call to the scheme. The system should provide the facility to return to the first caller at any point.
- When a call is closed the system should force the service provider to enter a reason for the call and the system should record any actions taken by the service provider in the calls history. The facility should also exist to make the adding of an action mandatory.
- In addition it should be possible to direct a call to another user or to a remote worker such as a scheme manager. In doing this it should be possible to direct the call to any telephone number entered at the point of transfer.
- Provider should regularly achieve the following standards
  - 80% calls in 30 seconds
  - 98.5% calls in 60 seconds
  - Response within 45 minutes of deployment

- **Response Service**

- provide responder service to customers when site based staff are off site or out of hours
- respond to callouts where customers need assistance and liaise with other agencies where required i.e paramedics and give access to emergency services in the event of an emergency
- provide record of all call outs on site following protocol outlined

- **Call Review function**

- **Notes Creation Facility**

- **Voice Reassurance Messaging**

- **Call Prioritization**

- **General**

The service providers system should support the wide variety of units that are currently installed, available on the market and provide access to all features for each unit and protocol.

- **Protocols**

The service providers system should be able to interpret all existing protocols handled by the clients' current system as well as providing an open platform for additional protocols.

- **Incorporation of Ordinary Telephone Calls**
- **Caller Line Identity (CLI)**
- **Scheme Auto Test facility**

The system should provide a facility for testing all schemes being monitored by the control centre. It should be possible to start the facility either manually or automatically and as a minimum the facility should test (scheme equipment permitting) the operational status of each scheme, the identity of the scheme, the type of equipment connected, the Sheltered Scheme site status and whether there are any alarms pending on the scheme.

- **Location identification**

Community Telemedicine

An extension of the Telecare option.

- **System Resilience**

The system should provide a high integrity calls handling and data environment. The telecommunications architecture should provide for as a minimum dual redundancy such that the calls handling system cannot be completely lost through a common mode fault.

- **Software Ownership**

All aspects of the software application should be owned by the Service provider.

- **Security**

The system should provide password protection to all functions within the database with generic controls for edit, print, view of differing details. The system should provide for automatic database backups, ensuring that any information is stored in line with regulations (e.g. GDPR).

- **Management reports**

The system should provide both data report generation tools and a powerful management report suite in order to accommodate the reporting needs of Leeds Federated reporting requirements. The frequency of this reporting is to be agreed, but is anticipated to be on a quarterly basis or as and when requested. This should incorporate Call Analysis Reports. The management report facility must provide for reports that produce call acceptance analysis performance as well as analysing trend data such as calls analysis over a weekly period broken down by day of week or by hour of day or by both day of week and hour of day.

- **Disaster Recovery**

The service provider should have in place disaster recovery arrangements and these should include the ability to transfer calls handling quickly and seamlessly to a remote site.

The monitoring service will tailor its arrangements to ensure that Leeds Federated Sheltered Housing staff, and the association's Housing Management/Repair Call Centre, are provided with all necessary information.

## Existing Contracts information

## Transfer of Undertakings (Protection of Employment) (TUPE)

<b>Contract name(s)</b>	Eldercare UK Ltd		
<b>Name of person completing this form</b>	Laura Henthorn		
<b>Contract name(s)</b>	Leeds Federated Homes		
<b>Information as at (date)</b>	28/01/2019		

[illegible]