



# Procurement Policy

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## **Index**

1. Introduction
2. Policy Statement
3. Objectives
4. Legal Framework
5. Related Policies
6. Procurement Strategy
7. Roles and Responsibilities
8. Summary of Procedures
9. Partnering
10. Framework Agreements
11. Procurement Thresholds
12. Exceptions to Public Procurement
13. Renewals and Extensions to Existing Contracts
14. Contracts Register
15. Community Benefits
16. Standard Documents

## **Appendices**

1. Contract Procedures
2. ESPD Guidelines
3. Quality Assessment

## **1. Introduction**

The term 'Procurement' as used in this policy covers the process of commissioning all services, supplies and works by all departments of within Elderpark Housing Association. This mostly includes, but is not restricted to, Development, Maintenance, IT and Insurance contracts.

The term 'Supplier' as used in this policy will be deemed to include the supply of all services, goods, supplies or works, including contractors and consultants.

## **2. Policy**

It is the policy of EHA to:

1. Achieve Best Value for all development, maintenance contracts and other services , including the appointment of consultants, through the operation of efficient and effective procurement procedures, recognising that lowest cost will not always represent best value.
2. Ensure probity through transparency and accountability at all stages of the procurement process, including public advertising of contracts. (Public Contracts Scotland and annually on the Association's web site)
3. Ensure compliance with statutory legislation and guidance, in the carrying out of any procurement activity.
4. Due to the minor differences between the legislation for 'EU Regulated Procurements' and Scottish 'Lower Value Regulated Procurements', it is our intention as far as practicable, and in order to avoid confusion, to follow the full EU compliant processes for all contracts above the 'Lower Value Regulated Procurements' thresholds.
5. Contracts below the 'Lower Value Regulated Contracts' threshold will be procured in accordance with financial regulations following the same overall principles in terms of demonstrating probity and value for money, and in a manner proportionate to the nature of such smaller contracts.

## **3. Objectives**

The objectives of this policy are to ensure that EHA

1. Is able to demonstrate that value for money has been achieved, both in the commissioning of individual contracts, and as an organisation as a whole.
2. To ensure that all suppliers appointed by the Association are sufficiently competent, have sufficient resources and are committed to improving the service provided to customers.
3. Are committed to protecting the health and safety of our employees, customers, members of the public and suppliers' employees.

4. Are committed to promoting innovation in the delivery of services to customers.
5. Are committed to improving equalities, and the economic prosperity of the communities in which we work.
6. Ensure equal treatment of all suppliers, confidentiality of all information received from them, and transparency and proportionality for all aspects of the procurement process.

#### **4. Legal Framework**

The legal framework for public procurement includes the following:

##### **(a) European Community (EC) Treaty**

The EC Treaty applies to all public procurement activity regardless of value, including contracts below the thresholds at which advertising in the Official Journal of the European Union is required and including contracts which are exempt from application of the EC Procurement Directives.

Fundamental principles flowing from the Treaty include:

- transparency – contract procedures must be transparent and contract opportunities should generally be publicised;
- equal treatment and non-discrimination – potential suppliers must be treated equally;
- proportionality – procurement procedures and decisions must be proportionate; and
- mutual recognition – giving equal validity to qualifications and standards from other member states, where appropriate.

##### **(b) European Community (EC) procurement directives and implementing Scottish legislation.**

EU Regulated Procurements: EU legislation must be complied with for contracts over the thresholds set out in Appendix A. The procurement of contracts above these values are termed 'EU Regulated Procurements'.

Lower Value Regulated Procurements: The EU Directives are given effect in Scots law by The Procurement Reform (Scotland) Act 2014 which comes into force on 18th April 2016. This legislation however has introduced lower thresholds for contracts procured by public bodies, which are set out in Appendix A. The procurement of such contracts is termed 'Lower Value Regulated Procurements'.

Other Contracts: Contracts that fall below the value for 'Lower Value Regulated Procurements' do not need to comply with EU or Scottish procurement legislation. However there is an over-arching requirement of EU Directives that probity be demonstrated at all times when public bodies procure services, supplies and works.

### **(c) European Court of Justice and national case law**

Decisions of the European Court of Justice and the UK and Scottish national courts provide interpretation of the requirements of the EC Treaty and the EC Procurement Directives and can establish precedents which must be observed. This is constantly evolving, and EHA must ensure that it has appropriate arrangements in place to ensure that staff members and consultants (if dealing with procurement on the Association's behalf) responsible for procurement activity are kept up to date with developments in the legal framework.

### **(d) The Scottish Housing Regulator**

The Scottish Social Housing Charter is aimed at helping to improve the quality and value of the services that social landlords provide. This Charter includes two key outcomes relating to procurement:

- Outcome 13 – Value for Money - Social landlords manage all aspects of their businesses so that: tenants, owners and other customers receive services that provide continually improving value for the rent and other charges they pay.
- Outcomes 14 & 15 – Rents & Service Charges - Social landlords set rents and service charges in consultation with their tenants and other customers so that: (1) a balance is struck between the level of services provided, the cost of the services, and how far current and prospective tenants and other customers can afford them; and (2) tenants get clear information on how rent and other money is spent, including any details of individual items of expenditure above thresholds agreed between landlords and tenants.

### **(e) Scottish Government Guidance**

The Scottish Government has developed comprehensive procurement guidance for public bodies to improve the quality of and value delivered through procurement of public contracts in Scotland. This guidance can be accessed on the following website:

<http://www.scotland.gov.uk/Topics/Government/Procurement/buyer-information/spdlowlevel>

## **5. Related EHA Policies**

This policy should be read in conjunction with the following related EHA policy documents:

Business Plan  
Financial regulations  
Schedule of delegated authority policy  
Risk management strategy  
Asset management strategy  
Planned and cyclical maintenance policy  
Reactive repairs policy  
Sustainability policy

## **Business Plan**

EHA prepares a 3 Year Business Plan, which is updated annually and sets out:

- The vision, aims and key strategic objectives
- The main actions to be completed in the first years of the plan and how these complement the relevant key strategic objectives

## **EHA Financial Regulations**

In addition to the above regulatory provisions, EHA Financial Regulations contain thresholds that must be observed when procuring contracts.

Whilst there are some exceptions set out in these regulations, all procurement will comply with all relevant EU and Scottish procurement legislation.

## **Schedule of Delegated Authority**

This document sets out authorisation levels for:

- The appointment of suppliers, including contractors and consultants
- Applications for and acceptance of offers of funding
- Payment of suppliers

## **Risk Management Strategy**

EHA recognises that risk is an inevitable part of our work, and effective risk management optimises the balance between risk and control. The Risk Management Strategy sets out:

- The Group's risk appetite
- Risk management process
- Key roles and responsibilities
- Procedures for assessment, evaluation, monitoring and reporting

## **Project Risk Appraisal Policy**

The Group Project Risk Appraisal Policy is closely associated with the Risk Management Policy and sets out the risk appraisal process to be followed for capital and other projects dependent on the value of the project.

## **Asset Management Strategy**

The Group Asset Management Strategy sets out how the EHA will ensure the long term sustainability of all housing stock. It sets out:

- What information will be gathered for all housing and non-housing assets?
- How this information will be analysed

- How the association will tackle issues identified as a result of this assessment
- An 'Options Appraisal' process to be followed where significant issues are identified with any of the housing stock

## **6. Procurement Strategy**

As stated earlier, procurement includes the acquisition of goods, services and works from third parties, whether under formal contract or otherwise. EHA procures a wide range of goods, services and works.

The total value of contracts procured by EHA is currently above the threshold for which a Procurement Strategy is required by legislation. (£5m)

In terms of the planning and delivery of the procurement of goods, services and works, the Association will prepare a Procurement Strategy, and review this on an annual basis. This will contain, as a minimum, information on how expected 'Regulated Procurements':

- Are being undertaken in compliance with EU Treaty Principles of equal treatment, non-discrimination, transparency, proportionality and mutual recognition
- Are being undertaken in compliance with the sustainable procurement duty
- Contribute to the carrying out of the Association's functions and the achievement of our key strategic objectives
- Deliver value for money

**In addition our Procurement Strategy will set out our general policy on:**

- The use of community benefit requirements
- Consulting and engaging with those affected by our procurement
- The payment of a living wage to persons involved in producing, providing or constructing the subject matter of regulated procurements
- Promoting compliance by contractors and sub-contractors with the Health and Safety at Work etc. Act 1974 and any provision made under that Act
- The procurement of fairly and ethically traded goods and services

EHA will also complete and submit an Annual Report on our Procurement Strategy for approval of the management committee, which will report on compliance with these factors. This will be published as soon as practicable after the end of each financial year.

## **7. Roles and Responsibilities**

The key roles and responsibilities in relation to the procurement of contracts by the Association are illustrated below:

The Association's management committee will ensure appropriate governance and organisational arrangements are in place. It will also ensure sufficient skilled resources are available and that the procurement function is recognised in wider organisational policies.

Relevant departmental heads ensure that the function is appropriately staffed, organised and supported to deliver procurement requirements.

Operational managers & officers deliver user requirements whilst ensuring compliance with legislation and achieving best value.

The procurement function will be led by the head of the relevant department responsible for procurement of the contract, whose primary role will be to:

- develop, promote and implement appropriate procurement strategies and procedures, including authority to procure
- assess procurement competencies across the organisation and establish and address training needs
- provide professional, qualified procurement expertise, advice and services
- contribute to the aims and objectives of the Association, and take account of business needs and wider policy requirements
- pro-actively manage and develop our supplier base, including small and medium-sized enterprises (SMEs) and third sector and voluntary sector organisations, identifying and managing any supply risks or value added opportunities
- ensure that value for money is achieved
- ensure adherence to this procurement policy, current legislation and best practice
- support sustainability and corporate responsibility through procurement processes
- measure and report on procurement performance

The term 'Procurement Officer' is used to describe any member of staff who is involved in the procurement of goods, services or works. The key elements of a procurement officer's role are to:

- determine contract requirements and establish specifications in collaboration with end users
- establish cost-effectiveness, taking account of whole life costs and corporate social responsibility/sustainability issues
- identify and engage with other experts as required (e.g. consultants, end users, legal advisors, other internal departments etc.)
- develop an appropriate output-based specification to attract market interest and stimulate competition and innovation
- consider existing and/or collaborative contracts
- ensure that all procurement processes (tender, order from framework etc.) are compliant with relevant legal and policy obligations, advertising through the national portal where appropriate
- publicise procurement contact points and make available as much information as suppliers reasonably need to respond to the bidding process
- understand and comply with relevant legal obligations relating to the goods, services or works to be purchased, e.g. environmental/health and safety legislation
- manage the procurement procedure
- conduct any procurement clarification required prior to contract award
- finalise the contractual agreement and formal contract documentation
- establish a clear audit trail (including recording the contract on the contract register)

- notify the outcome of bids promptly and, within the bounds of commercial confidentiality, debriefing winners and losers on the outcome of the bidding process to facilitate better performance on future occasions
- ensure that adequate contract and supplier management arrangements are in place
- share knowledge to develop best practice
- provide support and guidance to the end user/customer

Detailed guidance on individual aspects of procurement practice is available through the Scottish Government's 'Scottish Public Procurement Toolkit' and from SPD/Centres of Expertise websites.

## **8. Summary of Procedures**

The preceding sections of this policy set out the Association's overall aims, objectives and obligations in terms of procurement, and how we intend to meet these. This section provides a brief summary of the procedures we will follow whilst carrying our procurement activity.

The Association will generally tend to follow the 'Open' (single stage) or 'Restricted' (two stages) Procedures as set out in the EU Legislation. Generally, where timescales permit, the Restricted Procedures will be followed whereby there is a selection of shortlisted tenderers, followed by a more detailed tender submission for those shortlisted.(see appendix 1 and 3)

### **The process requires:**

- Initial project notifications (sometimes called a PIN notice) as soon as the decision to proceed with the project has been made, where streamlined procedures are to be followed
- Publication of a Contract Notice to start the tender procedure
- A pre-selection shortlisting process, in the case of two stage tendering
- A tendering exercise to all interested parties (single stage) or shortlisted parties (two stages)
- Ideally between 3 and 6 Tenders or Quotations should be sought
- A Quality/Price assessment of tenders submitted
- Publication of a Contract Award Notice
- The observation of a 10 day 'Contract Standstill' period before awarding a contract for EU regulated and Lower Value Regulated Contracts
  - The provision of constructive feedback on submissions to all successful and unsuccessful bidders
- If the nature of the contract is such that three suitable Suppliers cannot be identified the Group will seek quotes from one or two suitable suppliers, provided that value for money can be demonstrated
- All suppliers must complete the relevant Pre-Qualification Questionnaire, and this must have been assessed and deemed to be satisfactory, prior to the supplier being appointed by the Groups
- Where a procurement exercise results in a 'Framework' of shortlisted suppliers being appointed, the tender documentation will set out clearly how 'Call Off' contracts will be awarded to suppliers on a fair and consistent basis

•Quotations and Tenders should be issued, received and retained by the Association as set out in separate procedures for the 'Receipt and Retention of Quotations & Tenders'.

Quick quote (PCS) procedures can also be used for small lower risk contracts under the value of £50,000 (no ESPD is required) A minimum of three quotations is required. (see appendix 2)

## **9. Partnering**

It should be noted that 'Partnering' is not a procurement route, rather it is a term used to describe a non-confrontational way of working through which all parties, including clients and suppliers act as a single team to achieve common goals. It is about developing systems and methods to enable people and organisations to operate more effectively and efficiently together irrespective of the nature of the project or the method of procurement used, and it is intended to overcome old confrontational ways of working.

Strategic and Project Specific Partnering Agreements will be considered by the Association where added value can be clearly demonstrated for a maximum period of 6 years.

## **10. Framework Agreements**

Rather than conducting stand alone procurement EHA may consider procurement through a framework agreement.

The Association will consider establishing procurement frameworks for any works, supplies or services it may require, including working collaboratively with other social landlords and public bodies

## **11. Procurement Thresholds**

EU Regulated Contract Thresholds:

Supplies	£181,000
Services	£181,000
Works	£4,550,000

N.B All figures are current as at 1st January 2018 and are exclusive of VAT.

Lower Value Regulated Contract Thresholds:

Supplies	£50,000
Services	£50,000
Works	£2,000,000

N.B All figures are current as at 1st January 2018 and are exclusive of VAT.

## **12. Exceptions to the above are as follows:**

- where consultants are being used and there is a reason to offer a particular firm the work (for example if they have unique skills or have carried out work at risk)
- where works have been included as part of a schedule of rates contract which has been tendered in the usual way and the cost of the repairs does not exceed £20,000
- where works and services are procured where no satisfactory alternative is available
- where works and services are only available from a limited number of suppliers – in which case, a reasonable number should be invited to quote or Tender
- where goods and materials are of a proprietary nature and no satisfactory alternative is available
- where, for other definable reasons, open competition would not be appropriate e.g. in the case of long-term agreements negotiated tenders or monopolies.

## **13. Renewals and Extensions to Existing Contracts**

A proposed extension, renewal or amendment to an existing contract may be considered equivalent to the award of a new contract if it constitutes a material change.

Material changes to a contract are those which demonstrate the intention of the parties to renegotiate the terms of the original contract.

The current regulations restrict the Associations ability to modify publicly procured contracts and must be approved by the Associations board.

## **14. Contracts Register**

EHA must keep and maintain a contracts register for all contracts over the value of £20,000. The register should also be advertised on the Associations website.

In relation to each contract, the contracts register must contain the following information:

- The award date
- The name of the contractor
- The subject matter of the contract
- The estimated value of the contract
- The contract start date
- The contract end date
- The duration of any period that the contract can be extended

## **15. Community Benefits**

The Association must consider imposing community benefit requirements as part of the contract delivery before carrying out the procurement.

EHA must include in the contract notice relative to the procurement a summary of the community benefit requirements or the reasons for not including any such requirements.

## **16. Standard Documents**

In order to ensure efficiency and consistency in the procurement process, standard documents that will be used by EHA will include:

- Pre-Qualification Questionnaire (ESPD) for Contracts with a value of over £50,000
- Procedures for the Receipt & Retention of Quotes and Tenders
- Code of Conduct for Suppliers
- Reference Forms

## Appendix 1: Contract Procedures

All contracts must comply with the European Community Treaty procurement directives and the Procurement Reform (Scotland) Act 2014 introduced on 18 April 2016.

All proposed contracts must first be approved by the Associations Management Committee before the procurement process can begin.

### Procurement Route

Contract Value	£5,000 - £10,000	£10,000 - £20,000	£20,000 - £50,000	Over £50,000
Complete an annual submission for all contracts to be approved by the Association's management committee	No	No	Yes	Yes
Advertise all up and coming contracts on the Association's web site normally updated annually	No	No	Yes	Yes
Advertise the Association's contracts register on the Associations web site normally updated annually	No	No	Yes	Yes
Advertise contracts on the Procurement Contracts Scotland web site (PCS)	No	No	No	Yes
Advertise contracts on the Procurement Scotland Contracts web site (Quick Quote)	No	Yes	Yes	No
Acquire a minimum of two quotations	Yes	No	No	No
Acquire a minimum of three quotations	No	Yes	Yes	No
Advise contractors of the outcome, lowest quotation must be accepted	Yes	Yes	Yes	No
Carry out the ESPD application process re the PCS website	No	No	No	Yes
Finalise ESPD weighting scores and advise contractors of the outcome	No	No	No	Yes
Finalise list of tenderers from the ESPD list (normally up to six contractors)	No	No	No	Yes
Complete the contactor quality score criteria prior to the tender opening stage	No	No	No	Yes
Appoint a quantity surveyor (usually if the contract value is over £150,000)	No	No	No	If applicable
Appoint an architect (usually if planning permission is required)	No	No	No	If applicable
Appoint a principal designer (CDM) (If notifiable to HSE)	No	No	No	If applicable
The Association's Management Committee must approve the appointment of consultants	N/A	N/A	N/A	Yes
Complete tender reports to be approved by the Association's management committee	No	No	No	Yes
When the contract is completed carry out a tenants satisfaction survey	Yes	Yes	Yes	Yes
Carry out a contractors assessment and report to the	Yes	Yes	Yes	Yes

management committee (advise contractor)				
Publish results of the satisfaction survey and assessments in the Association's newsletter	Yes	Yes	Yes	Yes
At the end of each financial year complete a progress report on all contracts to form a contracts register for that period	Yes	Yes	Yes	Yes

## **Appendix 2:        ESPD Guidelines**

### **Guidelines for Completion (Example)**

Contractors wishing to be considered for tendering must complete a pre-qualification quality questionnaire (ESPD). The pre-qualification questionnaire is enclosed. Contractors must adhere to the conditions and complete the questions contained within the pre-qualification quality questionnaire, and are requested to submit copies of the information listed on the questionnaire. The criteria for assessment are detailed in the questionnaire.

Answers must be completed in the space provided on the pre-qualification quality questionnaire. The answers given will be used by the tender panel to assess the quality and suitability of the applicants and their capacity to meet the overall requirements of the contract for which they have put themselves forward for.

Careful consideration should be given to the questions and contractors should formulate and edit their answers to convey to the tender panel the contractor's capacity to undertake the project. Unanswered questions will be given a zero score and may result in the application being rejected.

Should the responses be found to be erroneous or in any other way incorrect, we reserve the right to remove the applicant from the selection process.

Please note that no other information will be considered in the pre-qualification quality assessment and companies are strongly discouraged from submitting any additional information such as insurance details, accounts, advertising literature and irrelevant company brochures.

### **Part 1V:        Information required from you.**

#### **A:        Suitability**

The main contractor &/ or their subcontractors must provide their company number. They must hold membership and accreditations with the following or equivalent organisations:

Gas Safe /NICEIC or SELECT/ BS OHSAS 18001 (or equivalent) , or have, within the last 12 months is in the process of working toward successfully meeting the assessment requirements of a construction related scheme in registered membership of the Safety Schemes in Procurement (SSIP) forum e.g. CHAS.

#### **B:        Economic and Financial Standing**

Bidders will require to have had an average yearly turnover of £1m for the last three years. As evidence for the ESPD question 4B.1.2, the Association may ask for a copy of the bidders annual accounts for that period.

It is a requirement of this contract that bidders hold, or can commit to hold the following types and levels of insurance prior to the award:

Employers Compulsory Liability Insurance £5m

Public Liability Insurance £5m

Professional Indemnity Insurance £5m

## **C: Technical and Professional Ability**

**4C.1** Bidders are required to provide examples of a similar scope, size and nature, within the last five years that demonstrate that **they have the relevant experience to deliver the works.** This will include client name, contact details including phone and e mail, contract sum, start and completion date, project description including the project name KPI's (targets and results) CSS results (targets and results). We will require references **only if you are selected to tender** for this contract.

**4C.2** Bidders are required to provide details of their workforce, skills, qualifications and experience and their procedures for ensuring quality control together with any external organisations that the company uses to measure quality control.

**4C.4** Bidders are required to provide details of their effective IT systems It will be a requirement for the appointed contractor to successfully develop an interface between their own systems and the Associations (Capita Open House) in order to facilitate a full range of contract services including but not limited to:

Jobs are logged by Elderpark maintenance department on Capita and automatically interface through to the contractor's system either immediately or at timed intervals.

A portal is available from the contractor for our staff to make appointments for the tenant based on a number of slots allocated for each morning / afternoon allowing capacity for emergencies still to be dealt with in timescale.

Jobs will be completed by the contractor and automatically interface from their system into ours perhaps at the end of every evening or if using some form of handheld computer automatically for real time information – this will change our job to completed although still pending payment.

On a monthly basis the contractor will interface a single invoice for all the jobs completed during that period directly to our Capita system which will then change the code to fully completed on our system and transfer through to Open Accounts to make payment. Any jobs which have a value which doesn't correspond to the original order value (and doesn't meet our tolerance of perhaps 5%) will be bounced back as not available for payment and held for query within Capita and a revised invoice figure will be paid through our system – this should only leave a small number of jobs sitting at held which will be discussed between maintenance and the contractor

**4C.6.1** Bidders are required to provide details of their admin, support, supervisory and managerial staff professional qualifications, experience and suitability for management and control of the work being carried out.

Outline the roles and responsibilities within the contract. As a minimum it will be expected that the contract supervisor has SSSTS or equivalent experience in the sector.

**4C.10** Please provide details of the proportion of the contract that you intend to sub-contract and who they are. Provide details of how you have selected each sub-contractor, their capability and how you will manage the sub contracts and the form of sub contract you will use. **You must provide a completed ESPD for all of your proposed sub-contractors or you will be removed from the selection process.**

#### **D: Quality Assurance Schemes & Environmental Management**

The bidder must hold a UKAS (or equivalent non UKAS) accredited independent third party certificate of compliance in accordance with BS EN ISO 14001 (or equivalent) or a valid EMAS (or equivalent non UKAS accredited) or the bidder must have a relevant and signed Quality Policy.

The bidder must hold a UKAS (or equivalent non UKAS) accredited independent third party certificate of compliance in accordance with BS EN ISO 9001 (or equivalent) or the bidder must have a relevant and signed Environmental Policy.

#### **Selection Criteria**

The Housing Association's tender panel will mark the completed applications assessing the quality, skills and experience of the applicants and their capacity to meet the requirements of the contract for which they are tendering.

The selection criterion is to determine the capability and capacity of a contractor to deliver the contract.

Bidders must pass the minimum standards sections of the ESPD (Scotland) part 111.

Section A, B & D will be scored on a **pass / fail** basis.

Section C will be scored using the following selection weighting:

4C.1: Examples of similar works	40%
4C.2: Workforce and quality control	10%
4C.4: Effectiveness of IT system	30%
4C.6: Educational and professional qualifications	10%
4C.10 Sub contractors	10%

#### **ESPD Weighting and Tender Quality Score Evaluation**

It is recommended that a minimum of three panel members (who have the relevant experience) each score both of the above.

Contractors who do not qualify for tendering purposes must be advised of their weighting scores and reason for being unsuccessful.

References may be required at this stage from the contractors invited to tender.

All contract quality scores must be calculated before the tender return prices are known.

When the final contract quality and tender scores have been evaluated all contractors on the selected tender list will be provided with scores and feed back if required.

The successful contractor will be required at this stage to supply all documentation previously qualified on the ESPD application (Insurances, annual accounts, accreditations etc.)

The contract will be awarded on the PCS website after a ten day "stand still" period from the date of the tender return has expired.

#### ESPD Scoring Example

Criteria	ESPD Weighting	Score (maximum 10)	%
4C.1: Examples of similar work	50%	9 (9 Divided by 10 = 90% x 50%)	45
4C.2: Workforce and quality control	20%	8 (8 Divided by 10 = 80% x 15%)	16
4C.6: Educational and professional qualifications	20%	8 (8 Divided by 10 = 80% x 15%)	16
4C.9: Tools, plant and technical equipment	10%	10 (10 Divided by 10 = 100% x 10%)	10
		<b>Total Score</b>	<b>87</b>

#### ESPD Timescales

Stage 1 Assessment	Timescale
PCS notice seeking expressions of interest	N/A
Deadline for returning and completion of the ESPD by interested parties.	28 days from notification
Short listing of firms who submit an ESPD.	7 days after returns
<b>Stage 2 Assessment</b>	
Shortlisted firms invited to submit tender.	N/A
Tender return	28 days after invitation
Assess quality scores	Within 7 days of tender return
Contractors advised of the tender outcome	Within 7 days of tender return
Standstill Period	Normally 10 days
<b>Appointment</b>	

Proposed appointment ratified by EHA	ASAP
Contract Award Notice	After the standstill period
<b>Works</b>	
Site Start:	TBC
Completion:	TBC

### Appendix 3: Quality Assessment

Performance Scoring Criteria	Judgement	Score
Meets all of the clients requirements in the area being measured in accordance with the contract documents so that the works will be delivered in an excellent way that will be highly responsive to the needs of customers , the client and other stakeholders	Excellent	10
Meets most of the clients requirements in the area being measured almost completely so that the works will be delivered in a nearly excellent way that will be responsive to the needs of customers , the client and other stakeholders	Nearly Excellent	9
Meets the clients requirements in the area being measured well although not completely in one or two aspects but still so that the works will be delivered in a very good way that will be responsive to the needs of customers , the client and other stakeholders	Very Good	8
Meets the clients requirements in the area being measured well but not completely in some aspects but still so that the works will be delivered well in a way that will be reasonably responsive to the needs of customers , the client and other stakeholders	Good	7
Meets the clients requirements in the area being measured in the majority of aspects but fails in some aspects but still so that the works will be delivered well in a reasonable way that recognises the needs of customers , the client and other stakeholders	Reasonable	6
Meets the clients requirements in the area being measured in the majority of aspects but fails in some fundamental aspects so that there will be only satisfactory arrangements for the works.	Satisfactory	5
Meets the clients requirements in the area being measured in some fundamental aspects but fails in the majority of aspects so that there will be only moderately satisfactory arrangements for the works.	Moderately Satisfactory	4
Meets the clients requirements in the area being measured in some minor aspects but fails in the majority of aspects so that there will be unsatisfactory arrangements for the works.	Unsatisfactory	3
Fails to meet the clients requirements in the area being measured in nearly all aspects so that there will be poor delivery of the works.	Poor	2
Significantly fails to meet the clients requirements in the area being measured in nearly all aspects so that there will be very poor delivery of the works.	Very Poor	1
Either no answer is given or the tenderers proposals in that area completely fail to meet the client's requirements in the area being measured or do not answer the question raised.	Extremely Poor	0

#### Typical EHA Quality Assessment Questionnaire

Question	Information Required	Score	Score
1	Provide details of how you intend to undertake this contract and statutory obligations. This should cover:		

	<p>a) Detail how your company will ensure that where possible repairs will be completed 'Right First Time'</p> <p>b) Detail your arrangements for co-ordinating all trades that may be required to complete any work order issued under this contract</p> <p>c) Detail how will you ensure that appointments are made at first call and that they are subsequently kept?</p>	10	
2	<p>Provide details of how you will ensure compliance with the contractual timescales for the following work categories for the duration of the contract.</p> <p>a) Routine repairs</p> <p>b) Out of hours emergency calls</p> <p>c) Void turnover times</p>	10	
3	<p>Provide details of how your quality control/ supervision will be organised and how instances of unsatisfactory workmanship and/or behaviour and/or materials will be dealt with :</p>	10	
4	<p>Provide details of how your electronic facility will be integrated with the client's IT reporting systems (Capita) to ensure efficient data sharing including the forwarding of service and repair completion data to the Client and the calendar / diary process for arranging appointments and completion of invoice processes through the clients interface.</p>	10	
5	<p>In your experience what are the 3 key issues you have found in delivering this type of work package to clients, how have you overcome these issues in the past, and how to you propose to overcome them should they arise on this contract?</p>	10	
6	<p>Provide an example of tenant satisfaction results from another client for a routine repairs service/contract.</p>	10	
	<b>Summary Total</b>	<b>60</b>	

**"WHERE A SCORE OF 3 OR LESS IS AWARDED FOR A RESPONSE TO ANY QUESTION THE CONTRACTOR MAY BE EXCLUDED FROM THE TENDER EVALUATION PROCESS."**