

Questions (As defined in Method Statement)	Criteria or Section %	Evaluation Comments	Criteria Met		Notes		Criteria Met		Notes		Criteria Met		Notes		Criteria Met		Notes	
			Delete as appropriate	Enter Additional Info (if required)	Delete as appropriate	Enter Additional Info (if required)	Delete as appropriate	Enter Additional Info (if required)	Delete as appropriate	Enter Additional Info (if required)	Delete as appropriate	Enter Additional Info (if required)	Delete as appropriate	Enter Additional Info (if required)	Delete as appropriate	Enter Additional Info (if required)	Delete as appropriate	Enter Additional Info (if required)
Part 1 Potential Supplier Information	You/No	For information only	Yes		Yes		Yes		Yes		Yes		Yes		Yes		Yes	
Part 2 Section 2 - Grounds for mandatory exclusion	Pass/Fail	If an organisation cannot confirm any of the statements, the Authority reserves the right to disqualify the organisation from the process at this point in the evaluation.	Pass		Pass		Pass		Pass		Pass		Pass		Pass		Pass	
Part 2 Section 3 - Grounds for discretionary exclusion	Pass/Fail	If an organisation cannot confirm any of the statements, the Authority reserves the right to disqualify the organisation from the process at this point in the evaluation.	Pass		Pass		Pass		Pass		Pass		Pass		Pass		Pass	
Part 3 Section 4 - Economic and Financial Standing	Pass/Fail Self Assessment	If an organisation cannot confirm any of the statements, the Authority reserves the right to disqualify the organisation from the process at this point in the evaluation.	Pass		Pass/Fail		Pass/Fail		Pass/Fail		Pass/Fail		Pass/Fail		Pass		Pass/Fail	
Part 3 Section 5 - Wider Group Financial Information	Pass/Fail Self Assessment	Bidders undertake a self-assessment using the financial appraisal model provided. The Authority will only validate the information submitted by the successful tenderer(s).	Pass	Not applicable	Pass/Fail	Enter Pass/Fail from the Bidder(s) submission	Pass/Fail	Enter Pass/Fail from the Bidder(s) submission	Pass/Fail	Enter Pass/Fail from the Bidder(s) submission	Pass/Fail	Enter Pass/Fail from the Bidder(s) submission	Pass	Not applicable	Pass/Fail	Enter Pass/Fail from the Bidder(s) submission	Pass/Fail	Enter Pass/Fail from the Bidder(s) submission
Part 3 Section 6 - Technical and Professional Ability Additional Technical Questions	Pass/Fail quality threshold applicable to some questions and scored assessment	The Authority will use the scoring system shown above to evaluate the following additional technical questions 6.1 to 6.2																
6.1 Case Study		Please provide a single case study to demonstrate your experience of delivering services similar in scope and size to that detailed within the Specification Document relevant to the lot you are bidding for the housing and repairs services. The case study should provide a relevant example of delivering services of a similar scale, nature and volume. The case study does not necessarily have to be for a Local Authority. The services should have been delivered within the last 3 years. Reference contact details are required for the case study submitted. The named contact provided should be able to provide, if requested, written evidence to confirm the accuracy of the information provided below. The Authority may verify the references provided, by contacting references directly. If verification is sought and not received from the referee then the Authority reserves the right to disqualify the related case study. Please ensure that the client acting as referee has signed off the completed case study. Any case study provided without contact details for the referee may result in the case study receiving a zero score. Consortia bids should refer to Part 1 of the Instructions for Tendering of the Invitation to Tender.	Question 6.1 has a quality threshold of 50% to PASS. Failure to achieve this threshold will result in a FAIL, and your organisation will not be considered further or invited to tender.															
6.2 Case Study		Please provide an example of similar volumes or evidence of the volumes of the services under contract for questions 6.1, in no more than 500 words please provide an explanation for this e.g. your organisation is a new start-up or you have provided services in the past either not in volumes or not under a contract.	Question 6.2 has a quality threshold of 50% to PASS. Failure to achieve this threshold will result in a FAIL, and your organisation will not be considered further or invited to tender.	Score	Weighted	Notes	Score	Weighted	Notes	Score	Weighted	Notes	Score	Weighted	Notes	Score	Weighted	Notes
6.1 Case study or response to question 6.2	100.00%	10	5	50.00%	Overall a satisfactory response providing the following for the: Nature of Works undertaken which covered Minor repairs and maintenance including electrical repairs and upgrades which was similar to the Authority scope. The location was in Tyne and Wear, scale of works was similar, the value of works were slightly higher with the start and end date being longer and ongoing. The Type of Client was a Local Authority, Arms Length Management Organisation How the works were delivered relevant to the Scope They developed a programme, offered flexibility to meet appointments, identified vulnerable customers, issued appointment letters along with having a dedicated management team for the delivery. The engineer completed the job and stored the information on tablets. Identified the roles with named personnel as well as having shadow, directly employed electrician. Please detail how effective communication was undertaken with a) the client with regard to contract management, meetings and relevant correspondence Having a bespoke communications strategy and protocol, having daily contact with client and subcontract review meetings with the use of a bespoke online dashboard. b) dealing with neighbouring tenants on a day to day basis The TIC can contact neighbours at pre work planning stage and also during works. The Conditions of the Contract sets the approach to dealing with neighbours. c) involvement with complaints, complaints and the process for resolution as a sub-contractor Having 500000, mentions a complaints policy without providing the detail. Complaints are received in any form, are centrally recorded on a job log, system and acknowledged within 24 hours in writing with an escalation process to the MD. Failed to address Compliments.	2	20.00%	Overall reservations, the case study included: Nature of Works undertaken covered Electrical testing only and defects remedied and is not similar to the Scope of Works. The location was in the North East, the scale and value of works is lower, start and end date is within period for a short period and the type of Client was private landlords and letting agent. How the works were delivered relevant to the Scope - Provided a call out and planned upgrade services, and to end client delivery, having a local dedicated team and supply chain. They were self managed with 21 day turnaround, the site operations were explained and MMR drawings! Please detail how effective communication was undertaken with a) the client with regard to contract management, meetings and relevant correspondence Visit client to agree the Scope of Works, use a programme management tool and provide live updates for all properties with continual dialogue and joint working being identified. b) dealing with neighbouring tenants on a day to day basis Having a customer care policy, with no access protocols and detailed how they would liaise with tenant but lacking in detail around neighbouring properties. c) involvement with complaints, complaints and the process for resolution as a sub-contractor Compliments passed to the staff member concerned. The Complaints policy is referred to, however, lacking in detail (with ref B - attachment), the complaint would be notified within 48 hours. Overall the nature and how the works are delivered are not relevant to the Authority's scope and the case study is for a very short period and ending just within the allowed three year timescale.	2	20.00%	Overall a satisfactory response providing the following for the: Nature of Works undertaken covered testing and defects rectification although it is unclear if it's a repairs service in this section. The location was Scotland, the scale of works is similar, the value of works is higher, with the start and end date in period and for a longer and the Type of Client was a Local Authority How the works were delivered relevant to the Scope: Providing, minor, major and emergency repairs during electrical checks. Using a CFM system, used for contract management with a servicing data programme uploaded. The Appointment scheduling with teams along with the 'on clear' and 'no access' procedures are explained. Please detail how effective communication was undertaken with a) the client with regard to contract management, meetings and relevant correspondence First clear line contact communications and having monthly management meetings along with KPI meetings and the targets being established. b) dealing with neighbouring tenants on a day to day basis Works in social hours and informed the neighbours of the works where noise is anticipated although lacking in detail. c) involvement with complaints, complaints and the process for resolution as a sub-contractor Robust complaints handling procedure which is received by service coordinators and reported to Contracts Manager. Aimed to resolve within two days and then escalation to the Managing Director. Compliments to the Service Manager without identified during with the process. Failed to address compliments and lacking detail. The process. Failed to address compliments and lacking detail. The process. Failed to address compliments and lacking detail. The process.	2	20.00%					
Part 3 Section 7 - Modern Slavery Act 2015	Pass/Fail	If an organisation cannot confirm any of the statements, the Authority reserves the right to disqualify the organisation from the process at this point in the evaluation.	Pass	ACHIEVED THE REQUIRED THRESHOLD OF 50%	FAIL	FAILED TO ACHIEVE THE REQUIRED 50% THRESHOLD	FAIL	FAILED TO ACHIEVE THE REQUIRED 50% THRESHOLD	FAIL	FAILED TO ACHIEVE THE REQUIRED 50% THRESHOLD	FAIL	FAILED TO ACHIEVE THE REQUIRED 50% THRESHOLD	PASS	ACHIEVED THE REQUIRED THRESHOLD OF 50%	FAIL	FAILED TO ACHIEVE THE REQUIRED 50% THRESHOLD	FAIL	FAILED TO ACHIEVE THE REQUIRED 50% THRESHOLD
Part 3 Section 8.2 - Insurance	Pass/Fail	Bidders will confirm they have or will obtain the relevant insurances to pass. Copies of insurance certificates will only be requested from the successful tenderer(s).	Pass		Pass/Fail		Pass		Pass		Pass		Pass		Pass		Pass	
Part 3 Section 8.3 - Compliance with Equality Legislation	Pass/Fail	Bidders must confirm their compliance with equality legislation to pass.	Pass		Pass/Fail		Pass		Pass		Pass		Pass		Pass		Pass	
Part 4 Section 8.4 - Health and Safety High Risk	Pass/Fail	Bidders must complete the health & safety questionnaire to confirm that the information will be provided upon request. The Authority will only request and evaluate the relevant health & safety information and risk assessments from the successful tenderer(s).	Pass		Pass/Fail		Pass/Fail		Pass/Fail		Pass/Fail		Pass		Pass/Fail		Pass/Fail	
The Authority has provided details below of the team who it is envisaged will be undertaking the evaluation, but reserves the right to change personnel at any stage of the tender process if the need arises. Bidders are advised NOT to use any of the named Evaluation Panel Members listed as References for responses to either Section 6 or Case Study or any of the questions in section 6.1, should they have previously provided similar works or services to the Authority. This will cause a conflict of interest for the evaluation and any named reference(s) will have to be replaced and this could delay the evaluation process whilst a replacement is found. To clarify, Bidders can still use the Authority as a reference.	Document Number P-001-001-P56/NTC Issue No.1, Page 1 of 1		Name	Date Case Study	Date Section 8.1	Name	Date Case Study	Date Section 8.2	Name	Date Case Study	Date Section 8.3	Name	Date Case Study	Date Section 8.3				
			Steve Lowther - Service Manager	11-Feb-22	16-Feb-22	John Caulfield - Senior Quantity Surveyor	11-Feb-22	16-Feb-22	Andy Hunter - Team Leader	11-Feb-22	16-Feb-22	John Caulfield - Senior Quantity Surveyor	11-Feb-22	16-Feb-22				