

TENDER EVALUATION REPORT	CATEGORY/SUBCATEGORY:	People / Housing Related Support Services
	INITIATIVE NUMBER & TITLE:	23-056 Tenants Federation
	YORtender REF:	76407
	CATEGORY MANAGER:	Yvonne Dutton - Procurement Category Manager
	SERVICE LEAD:	James Smith - Tenant Engagement Manager

1. PURPOSE

The purpose of this tender evaluation report is to provide James Clark, Assistant Director of Housing with a summary of the procurement process undertaken, the outcomes achieved along with any potential issues and risks in order to seek approval to move to contract award.

2. OBJECTIVES OF RESULTANT AGREEMENT

As detailed in the procurement business case approved by Ian Spicer Strategic Director on 26/10/2024 Rotherham Metropolitan Borough Council own and manage circa 20,000 residential properties in addition to neighbourhood centres, community buildings, play areas and greenspaces. The Council has a clear role not only in managing homes but also the quality and sustainability of our neighbourhoods.

The Council are aiming to increase the overall number of homes through the creation of new housing, as well as continued investment to improve our existing homes and communities.

The council's vision is to put tenants at the heart of everything we do ensuring that council tenancies and estates are sustainable and are set within safe, strong, and cohesive communities.

The Council is committed to involving tenants in all aspects of housing service delivery to our customers. The intention is to continue building on this through continuous improvement and innovation, strengthening and expanding opportunities for tenants to

influence and make a genuine difference to services and future direction, ensuring that Rotherham continues to be at the forefront of Tenant Engagement. A Tenant Federation offer within Rotherham will enable council tenants with an independent voice to provide scrutiny and accountability, better decision making and an improved quality housing service. These arrangements will make sure we continue to meet and exceed the Homes England Regulatory Tenant Involvement and Empowerment Standard.

The successful Tenant Federation provider will help support and add value to the Housing service and other services in delivering the councils Thriving Neighbourhoods Strategy which aims to achieve thriving neighbourhoods where people can work together in achieving a good quality of life.

3. KEY FACTS

3.1	Contract Value:	£888,000 (Full 4 – year term) £666,000 (Initial 3 -year term) £222,000 (Annual Value)
3.2	Initial Contract Term (months):	36
3.3	Extension Options (months):	12
3.4	Route to Market:	Above Threshold Open Tender Process
3.5	Contract Notice Reference Number	23-056 Federation of Tenants - Find a Tender (find-tender.service.gov.uk) Federation of Tenants - Contracts Finder
3.6	Tender Closing Date:	27/11/2023
3.7	Number of Expressions of Interest Received:	9
3.8	Number of Tenders Received:	1

4. EVALUATION

4.1 Evaluation Panel Members

Facilitator:	Yvonne Dutton (Procurement Category Manager)
Compliance Checks:	Karen Potts (Procurement Officer)

Selection Criteria:	Karen Potts (Procurement Officer)
Award Criteria: Quality:	James Smith (Tenant Engagement Manager) Callie Lamb (Tenant Involvement Officer) Daniel Cowley (National Management Trainee) Jessica Sarracco (Estates Services Officer)
Award Criteria: Social Value	The Social Value Portal verified by Yvonne Dutton (Procurement Category Manager, People Team)
Award Criteria: Price:	N/A

4.2 Dates

Individual Evaluation:	30/11/2023	to	11/12/2023
Moderation:	12/12/2023	to	12/12/2023

4.3 Summary Scores

Detailed below is a summary of the final outcome. A copy of the full evaluation records can be obtained from the Procurement Category Manager detailed at the top of this report.

Bidders Name	Compliance	Selection Criteria	Award Criteria			Total Score
			Mandatory Criteria	Quality Score 80%	Social Value Score 20%	
Rotherham Federation of Communities Ltd	Pass	Pass	Pass	54.38	17.50	71.88

4.4 Successful Bid(s) Details

Bidders Name:	Rotherham Federation of Communities Ltd
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4.5 Due Diligence

A credit safe check has been undertaken on the supplier (Company Registration Number 5913521 Charity registration Number 1158600) which has returned a risk score of 91, indicating this supplier is a low risk to the authority.

The successful provider Rotherfed are the current incumbent who have delivered a successful Tenant Federation service for over 8 years. This has allowed for a strong

working relationship to develop with the Council over this time. As such, the contract manager James Smith did not feel a due diligence meeting was necessary. However, discussions regarding the specification and setting the scene in terms of performance expectations will take place during the mobilisation period.

5 OUTCOMES ACHIEVED

The incumbent provider (a local Rotherham based organisation) has retained the. As such there will be limited mobilisation activity required.

The Chief Executive Officer, Rotherham Federation of Communities Ltd (Rotherfed) has confirmed as of 12/12/2023 that Rotherfed became an accredited real living wage employer although this is not clear on the Living Wage Foundation page just yet, the Rotherfed CEO confirmed this is imminent and provided the email from the foundation congratulating the company. This will need to be verified annually throughout ongoing contract management and records updated accordingly.

Due to the value of the contract a Social Value commitment has been secured and the following commitments will form part of the contract. Failure to achieve the commitments specified may result in the Council seeking some form of reimbursement, these commitments will form part of contract management and Social Value must be a standard agenda item in all contract review meetings. Each of the National TOMS carries a proxy value which has been calculated based on government data including the Greenbook and ONS, these proxy values are used to calculate the total SLEVA (Social and Local Economic Value Added) for each target which is then aggregated together for the supplier submission as part of the evaluation.

Based on the commitments from Rotherham Federation of Communities Ltd the envisaged total target SLEVA to be delivered via this contract is £27,903.00. This is based on the proposed contract value over the initial 3-year term £666,000 and equates to a social value return of 4.19%. Rotherham Federation of Communities Ltd will be encouraged to maximise further opportunities in order to generate further social value in the delivery of this contract.

RMBC Social Value Framework Specific Commitments

National TOMS Reference	Description	Target
NT1	No. of direct local employees (FTE) hired or retained on the contract	1.0

6 RISKS / ISSUES

The risk register prepared as part of the original pre-procurement business case has been reviewed and there are no red risks to highlight following the conclusion of the evaluation.

7 FINANCIAL AND OVERALL PROJECT COST IMPLICATIONS

There is budget included within the HRA in 2024/25 to fund this activity. This will be managed as a recurring budget for future years of the contract.

8 RECOMMENDATION

Following the evaluation for this tender, it is the recommendation of the project team that the Council progresses to issue a formal award to Rotherham Federation of Tenants.

9 NEXT STEPS

The original timeline included a provisional 10 standstill period however as there was only 1 bid received standstill period is no longer applicable.

Once the formal approval has been granted an award letter will be issued to Rotherham Federation of Tenants advising them of the outcome and a contract will be issued for signature to James Clark, (Assistant Director of Housing) via DocuSign.

It is envisaged that the notification letter will be issued on the 29th^{of} January 2024.

The new service will commence on 01/04/2024.

As the value of this contract exceeds £250,000, this report is accompanied with an Officer Delegated Decision Note and is included on the forward plan.

10 REPORT AUTHOR AND APPROVER

10.4 Report Author

Name: Yvonne Dutton

Date: 16/01/2024

10.5 Reviewed by Head of Procurement (or deputy)

Name: Karen Middlebrook

Date: 17/01/2024

10.6 Reviewed by Head of Finance (or deputy)

Name:	Kath Andrews (on behalf of Gioia Morrison)
Date:	15/01/2024
10.7	Approver (approval obtained electronically)
Name:	J Clark
Evidence:	FW Final 23-056 Federation of Tenants TER.docx.msg
Date:	19/01/2024