

**TENDER INVITATION**

**TENANT SATISFACTION SURVEYS**

Tenders must be received at Craigdale Housing Association’s Offices no later than **12 noon, Friday 9th May 2025.**

Late submissions will not be accepted.

**Introduction

About Us - Delivering social housing since 1988**

Craigdale Housing Association (CHA) is a Registered Social Landlord and Scottish Charity.

Since formation in 1988, CHA has built a solid tradition of driving positive change in the Castlemilk community through housing led regeneration and delivery of excellent service. We are proud to be one of the top performing housing associations in Scotland, with high levels of tenant satisfaction.

Our asset base is made up of 407 self-contained houses and 3 shared ownership properties. The stock was acquired through 10 phases of new build development and the refurbishment of existing tenement buildings. A small number of privately owned properties are factored. The Association’s office is in the heart of the community and CHA owns it outright.

With tenants at our heart, we are determined to continue to offer value for money and exceptional service. We are committed to continuous improvement and innovation in service delivery and tenant engagement.

**Our Key Requirements**

There are two parts for the tender submission as set out briefly in the Instructions To Tenderers (ITT) introduction:

**Part A: Our 3 yearly Tenant Survey- Key Objectives**

Our last survey was completed in Summer 2022. CHA is seeking the following outcomes from our comprehensive customer survey:

* Tenant survey of 100% of our current tenants, shared owners and factored owners, totalling 426 customers
* Detailed understanding of our tenant’s satisfaction with those services as measured by the Scottish Social Housing Charter, and other useful and robust satisfaction performance indicators
* Feedback from our tenants on their key priorities which we can use to drive and inform our Business Planning process
* A better understanding of service quality improvements, new services and approaches that would increase tenant satisfaction and engagement
* A better understanding of what CHA providing value for money means to our customers, both tenants and our shared and factored owners
* An understanding of tenants’ views on the affordability of our rent and service charges
* More information on our tenant profile/demographics including understanding of the extent of digital inclusion and needs for online and 24-hour services.

**Mandatory Requirements**

* Proposals will need to comply with the requirements for evidence set out by the Scottish Housing Regulator (SHR) and Scottish Social Housing Charter. As a minimum, the design, analysis, reporting and fieldwork will need to meet the standards set out in the Ipsos MORI Scotland document ‘Conducting surveys of tenants and service users- a guide’ (May 2016)
* The Scottish Social Housing Charter indicators must be included in all survey results and where appropriate referred to the SHR’s Regulatory Standards
* The survey must be designed and managed to strictly comply with new UKGDPR requirements and the Market Research Society’s Code of Conduct
* CHA’s tenants and Board should be consulted in the development and feedback of the surveys
* The 3-year Tenant Survey should be completed no later than August 2025.

**Part B: Our Biannual Surveys**

The purpose of our biannual surveys is to measure tenant satisfaction across key Scottish Social Housing Charter indicators and other selected indicators. We wish to maximise the quality and depth of the feedback we will receive from these surveys. CHA is seeking the following outcomes from our biannual surveys:

* You must provide a price for 75 telephone interviews with tenants per survey
* Provision of innovative survey design and sampling of tenants who receive a service from CHA, to ensure we are continuously improving our tenants experience based on their feedback
* Regular, timely feedback on tenant’s experience of CHA including our key services and our people
* Trend comparison and analysis of biannual results against previous results where appropriate
* Regular review and flexibility in approach to these surveys and the performance indicators and questions to ensure they remain fit for purpose and sufficiently challenge CHA to deliver continuous improvement to meet customer needs.

Proposals will also need to comply with our mandatory requirements set out above.

**TENANT SATISFACTION SURVEY AND BIANNUAL SURVEYS FOR THE PERIOD 2025 TO 2028 – Craigdale Housing Association Ltd**

**INSTRUCTIONS TO TENDERERS**

1. This invitation to tender (ITT) is for the provision of tenant satisfaction surveys from 2025 to 2028, for customers (e.g. tenants, shared owners and factored owners) of Craigdale Housing Association (CHA).

2. CHA carries out a comprehensive satisfaction survey normally every 3 years. This survey is due to take place this year and should be completed by the no later than August 2025. The survey will take the form of face-to-face interviews (or by telephone).

3. Biannual surveys are also being tendered for a 3-year period. The biannual customer surveys will include surveying a prescribed number of customers by telephone (as set out in the detail of this ITT), analysis, performance comparison, reporting and best practice.

4. This ITT sets out the requirements, scope and tender process to be followed for the comprehensive survey and biannual surveys and invites tenders for the provision of these services.

5. Tenders will need to submit the following information as part of their submission:

* 2 suitable references that you have carried out work for in a similar capacity to this commission and contact details for each referee
* A set of your 2023/24 audited accounts
* A copy of your Health & Safety Policy and Equality Policy
* A copy of your professional indemnity insurance cover.

6. Each tenderer is required to immediately notify CHA of any change to its financial or other circumstances, or where the tenderer is a consortium, any change in memberships, financial or other circumstances of the members of the consortium, since the submission of the tender.

7. The successful Service Provider may be required to provide additional surveys or survey questions, and these will be agreed during the contract period in accordance with the rates submitted with the tender.

8. No legal relationship or other obligation shall exist or deem to exist between any tenderer and CHA until a contract has been formally entered into between the successful tenderer and CHA.

9. CHA will not be liable for any bid costs or expenditure incurred by tenderers or by the appointed Service Provider during and for this tender process, including where the procurement exercise is terminated or amended by CHA.

10. CHA wishes to maximise the value obtained from this work. However, CHA is not bound to accept the lowest tender and reserves the right to make no award to any tenderer.

11. Tenders will be assessed by a tender evaluation panel comprising 3 representatives from CHA. The evaluation panel will, if necessary, contact tenderers to seek clarification of any aspect of a tender.

12. Tenderers should identify any work they are currently carrying out or competing which could cause a conflict of interest and indicate how such a conflict would be dealt with. Tenderers should also advise CHA as soon as practicable in the event of discovering a potential or actual conflict of interest arising in respect of their tender response. In such circumstances, CHA may require further information from the tenderer but reserves the right to disqualify the tenderer from further involvement in the tender process.

13. Direct or indirect canvassing of any Board Member of CHA, their employees, or agents, by any potential service provider concerning this invitation to tender, or any attempt to procure information from any Board member of CHA, their employees or agents, concerning this invitation to tender, will result in the disqualification of the potential service provider from consideration.

14. Tenderers are required to submit a tender strictly in accordance with the requirements set out in this ITT to ensure that CHA have the correct information to make the evaluation fairly and transparently. Evasive, unclear, or hedged tenders may be discounted as part of the evaluation process and may be rejected at CHA’s sole discretion.

15. A contract that may be awarded following this procurement exercise will be awarded based on the offer that is the Most Economically Advantageous Tender (MEAT).

16. Tenderers are required to fully complete Appendices 1, 2 and 3, which are attached to this ITT.

17. Tenders will be evaluated on the basis of a cost and quality assessment, split on the basis of 30% cost and 70% quality, which will then be added to reach a total score of 100%. The tenderer with the highest score will be awarded the contract. More details are provided below on how tenders will be scored.

18. The Method Statement Questions (MSQ) in (Appendix 2) allow CHA to assess a tenderer’s approach to dealing with an actual contract; this covers such areas as survey design, communication, customer satisfaction, complaint handling process and contract management.

The MSQs will be assessed using the following criteria:

|  |  |  |
| --- | --- | --- |
| **Response**  | **Example**  | **Score** |
| Unacceptable | Nil or inadequate response. Fails to demonstrate previous experience/capacity/capability relevant to this criterion | 0 |
| Poor | Response is partially relevant but generally poor. The response shows some elements of relevance to the criterion but contains insufficient/limited detail or explanation to demonstrate previous relevant experience/ capacity/capability | 1 |
| Acceptable | Response is relevant and acceptable. The response demonstrates broad previous experience, knowledge and skills/capacity/capability but may lack in some aspects of similarity e.g. previous experience, knowledge or skills may not be of a similar nature | 2 |
| Good | Response is relevant and good. The response is sufficiently detailed to demonstrate a good amount of experience, knowledge or skills/capacity/capability relevant to providing similar services to similar clients | 3 |
| Excellent | Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates thorough experience, knowledge or skills/capacity/capability relevant to providing similar services to similar clients | 4 |

MSQs form 70% of the total quality score and will be scored as follows:

|  |  |
| --- | --- |
| **Questions** | **Scoring (from table above)** |
| Development and design of questionnaires | Maximum 4 points |
| Customer engagement process | Maximum 4 points |
| Added value/Innovation | Maximum 4 points |
| Timescales and Reporting  | Maximum 4 points |
| **Total** | **Maximum 16 points** |

Each tenderer will receive a % score calculated by reference to the following formula:

tenderer’s total score

x 70

16

For example, a score of 16 gets 70%, a score of 13 gets 57% and a score of 9 gets 39%.

19. Tenderers must also complete the pricing form at Appendix 3. Prices need to be capable of being analysed and reported by CHA and include:

* all programmed customer satisfaction costs for duration of the Contract
* prices for an increase in the number of biannual surveys in line with business demands
* all travel and other expenses.

**Part A:** Tenderers are required to submit a fixed price for the 3-year survey to include all design, analysis, reporting and fieldwork and meetings. In addition, we require an all-inclusive cost per face-to-face interview.

**Part B**: Tenderers are also required to submit a fixed price for the rolling programme of biannual surveys, including all design, analysis, reporting and fieldwork and meetings for the 3 years starting with Q2 2025/28.

Tenderers’ annual prices must be kept at the same level for the three years of the Contract.

The price scoring will be affected in accordance with the following:

|  |  |
| --- | --- |
| **% Points** | **Pricing Evaluation** |
| 30% cost scoring | Lowest priced supplier – for Cost of Tender Proposal over Contract period |
|  | Providers will receive a % score calculated by reference to the following formula:lowest price X 30Service Provider’s Price |

20. Interviews may be held following receipt of tender submissions to allow for further interrogation of any bid and to invite discussion.

21. If you have any queries in relation to your submission please contact Frances Cunningham, Corporate Manager, or Linda Chelton, Chief Executive on 0141-634-6473 no later than 12 Noon on Wednesday**, 7th May 2025**.

22. Tenderers should submit their tenders by post or courier, marked “Tender for Tenants Survey Services – Do Not Open” by 12 Noon on Fridady 9th May 2025 to:

Frances Cunningham

Corporate Manager

Craigdale Housing Association

83-85 Dougrie Road

Castlemilk
Glasgow, G45-9NS

(T) 0141 634 6473

(E) frances@craigdaleha.co.uk

23. The table below outlines the timetable (may be subject to change at CHA’s discretion) for the process:

|  |  |
| --- | --- |
| **Date** | **Action** |
| 9th May 2025 | 12 Noon deadline for tender returns. |
| 12th May 2025 | Tender evaluations.  |
| 20th May 2025 | Appointment of Service Provider (subject to references). |
| TBC | Contract start date. |

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**APPENDIX 1**

**Tenant Satisfaction Surveys**

**Tenderers Information**

**Section 1 – Company Information**

|  |  |
| --- | --- |
| **Company Name:** |  |
| **Address:** |  |
| **Telephone Number:** |  |
| **Fax Number:** |  |
| **E-Mail Address:** |  |

# Section 2 – Key Project Personnel

|  |  |
| --- | --- |
| **Name:** |  |
| **Professional Memberships:** |  |
| **Accreditations:** |  |
| **Other Relevant Details:** |  |

|  |  |
| --- | --- |
| **Name:** |  |
| **Professional Memberships:** |  |
| **Accreditations:** |  |
| **Other Relevant Details:** |  |

|  |  |
| --- | --- |
| **Name:** |  |
| **Professional Memberships:** |  |
| **Accreditations:** |  |
| **Other Relevant Details:** |  |

**Section 3 – Reference details**

|  |  |
| --- | --- |
| **Name:** |  |
| **Company name & address:** |  |
| **Phone number & email address:** |  |
| **Other Relevant Details:** |  |

|  |  |
| --- | --- |
| **Name:** |  |
| **Company name & address:** |  |
| **Phone number & email address:** |  |
| **Other Relevant Details:** |  |

**Section 4 – Additional Information**

Please provide the following with your tender submissions.

**Failure to provide all or part of the information required in this Section will result in your submission being excluded from the evaluation process.**

|  |  |
| --- | --- |
| Audited Accounts to 31 March 2024 |  |
| Public Liability Insurance Certificate |  |
| Health and Safety Policy |  |
| Equality Policy |  |
| Any Other Appropriate Licences |  |

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##### **APPENDIX 2**

**Tenant Satisfaction Surveys**

**Method Statement Questions**

|  |  |
| --- | --- |
| **No.** | **Question** |
| **01** | **Design of the Questionnaire**The Service Provider will be fully responsible for the development, design, delivery and execution of the tenant satisfaction survey processes. This includes both the 3 yearly customer survey 2025/26, and the biannual surveys for 2025 – 2028. You must have previous experience of carrying out similar surveys and an understanding of the relevant Scottish Housing Regulatory requirements; your method and approach for both types of survey must ensure compliance with the Ipsos MORI guidance including quality control.Describe how you will ensure the effective design, development and delivery of the 3 yearly customer survey for 2025/26 and the Biannual surveys for 2025 – 2028. Please provide a detailed Implementation Plan showing clear timescales for completion. The Implementation Plan should include, for example: customers, stakeholders, communication, information transfer, relationship-building with key CHA personnel, key milestones, timescales, etc.  Please provide your recommendations on survey design, process, sample size and analysis for the biannual surveys and on-going performance reporting. Please set out how you intend to comply with UKGDPR as a data processor.Maximum of 1,000 words. |
|  |

|  |  |
| --- | --- |
| **No.** | **Question** |
| **02** | **Tenant & Board Engagement**The Service Provider shall engage with customers of the service (tenants, shared owners and factored owners) & Board members to design and deliver the satisfaction surveys. Please provide a response below as to how your organisation will engage customers and Board members in the design & delivery of the surveys. Please make reference to a previous example of where you have engaged with customers & Board members. Describe the responsibilities and roles that key personnel will perform in relation to this contract and their experience of customer & Board engagement. Include methods of communication between CHA and these key personnel.Provide an organisation chart of your company and all key personnel proposed to be involved in delivering this Service. Maximum of 1,000 words |
|  |

|  |
| --- |
| **No. Question** |
| **03** | **Added Value/Innovation**As part of the survey fieldwork and feedback, CHA are keen that added value must be gained through the contract. This may include innovative design and survey sampling methodology, examples of best practice in other organisations, benchmarking information and recommendations for future improvements/changing practice where required, through both the annual 2025/26 survey and the 3 year programme of biannual surveys. Please provide examples of previous added value work that you have completed in other organisations.Maximum of 1,000 words |
|  |

|  |
| --- |
| **No. Question** |
| **04** | **Timescale and Reporting** It is essential that tight timescales are adhered to for both the annual survey and the biannual surveys as there are timescales implications for Board and Committee consideration. Please set out how you intend to resource and manage the single survey in 2025/26 and on the on-going biannual telephone surveys, demonstrating flexibility of approach to maintain sufficient challenge to deliver continuous improvement for customers.A timetable and delivery programme to ensure completion of the 3 year/annual survey and reporting including all meetings.Please provide reporting format samples for the 3 year survey and biannual surveys which is suitable for customer feedback.Maximum of 1,000 words |
|  |

##### **Logo, company name  Description automatically generated**

**APPENDIX 3**

**Tenant Satisfaction Surveys**

**Pricing**

**Pricing**

The schedule of price must indicate prices exclusive of VAT; the VAT applicable, and the price inclusive of VAT.

All prices must include all design, analysis, reporting, fieldwork, meetings and expenses.

**Please detail the following for CHA:**

1. **(a) Part A and Part B Costs and Total Contract Price**

Total Contract Price for the 3 years ending 31st March 2028

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | **Price excluding VAT** | **VAT at 20% of price** | **Total price with VAT**  |
| **Year 1(2025)** | Part A) Annual Customer Survey 2025/26(face to face) |  |  |  |
|  | Part A) Annual Customer Survey 2025/26(telephone) |  |  |  |
|  | Part B) 2 x telephone surveys per annum and associated feedback based on 75 customers per survey |  |  |  |
| **Year 2(2026/27)** | Part B) 2 x telephone surveys per annum and associated feedback based on 75 customers per survey |  |  |  |
| **Year 3****(2027/28)** | Part B) 2 x telephone surveys per annum and associatedfeedback based on 75 customers per survey |  |  |  |
| **Total Price over 3 years**  |  |

**(b) Please provide costs for any additional surveys that we may request during the contract period:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Type of Survey** | **Price per survey including VAT** | **VAT at 20% of Price** | **Total Price** |
| Face to face |  |  |  |
| Telephone  |  |  |  |
| Staff Satisfaction |  |  |  |

**TENDER DECLARATION**

1. Having examined all documentation within this Invitation to Tender, I / we undertake to provide the above-mentioned in accordance with the ITT and my / our Tender.
2. I / we formally declare that the information provided in my Tender Response is accurate and correct and that it has been set out in full awareness of the consequences of serious misrepresentation, including being excluded from the process.
3. I / we confirm that I accept the Contract conditions in the ITT without wishing to make any material changes.
4. I / we declare 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 ("person" includes any persons, body or association, corporate or incorporate).
5. I / we declare that I am / we are not aware of any connection with a member of CHA’s staff or governing body which could affect the outcome of the bidding process.
6. I / we understand that any misrepresentations may also be the subject of criminal investigation or used as a basis for civil action.

The price(s) stated in the Tender Response will be valid for 3 months.

I / we agree that all prices will be fixed for the term of this contract.

I / we understand that you are not bound to accept the lowest or any tender.

|  |  |
| --- | --- |
| **Signed:** |  |
| **For or on Behalf of:** |  |
| **Address:** |  |
| **Position in Company:** |  |

|  |
| --- |
| **Declaration** |
| To Craigdale Housing Association:  I / We hereby provide a tender to supply and deliver the goods/services specified in the attached outline.No Collusion Certificate I / We certify that this is a bona fide quotation, intended to be competitive and that we have not fixed or adjusted the amount of the quotation by or under or in accordance with any agreement with any other person. I / We also certify that we have not done, and we undertake not to do at any time, before the closing date for the return of the tender any of the following acts: -  1. Communicating to a person other than the person calling for this quotation the amount or approximate amount of the quotation herewith submitted
2. Entering into any agreement or arrangement with any other person that he shall refrain from quoting or as to the amount of any quote submitted
3. Offering or paying or giving or agreeing to pay any sum of money or consideration directly or indirectly to any person for doing or having done or causing or having caused to have done in relation to any other quotation or proposed quotation any act or thing of the sort described above.

 In this certificate, the word `person' includes any persons and any-body or association corporate or incorporate; and `any agreement or arrangement' includes any transaction formal or informal whether legally binding or not.  |
| **Signature of Authorised Person:** |  |
| **Date:** |  |
| **Please Print Name:** |  |