

**Tree Strategy**  
**Phase 2 - Evaluation of Tenders**  
**Customer Involvement Report**

**February 2021**

**Steve Martin**  
**Customer Involvement Officer**



# Contents

Report purpose	3
Consultation Methodology	3
Consultation Findings	5
Report summary	9
Report recommendations	11
What happens next	13



## Report Purpose

Southern Housing Group are reviewing the maintenance of trees on communal land. This report focuses on the evaluation of tenders (bids) for the proactive and reactive maintenance programme for trees on communal land.

The Project Team is being led by James Mark, Head of Property and Estate Management South. Ian Scott, Director of Estate Services, is the projects' sponsor. Daniel Gibson from Procurement for Homes (PFH) was recruited by SHG as the consultant for the tender process.

Residents were involved in the first phase of this project (review of the current process) and the feedback and comments they provided assisted the Tree Strategy Project Team ask contractors key questions from the perspective of residents as part of the tender (bid) process.

Two residents trained in Procurement and Contract Reviews were appointed to assist the Project Team with a set questions during the scoring process.

Once the tender process has been completed and the contractor selected, the Group will aim to have the contract in place to start in time for the next financial year, April 2021.

The next opportunity to involve residents is the review of the communication to regions about the tree contract for their area.

The ongoing involvement of residents will be the role that Estate Inspectors will play in monitoring the standards based on the Service Level Agreements set out in the contracts.

## Consultation Methodology.

### 'Weighting'

The consultant and Project Lead agreed a 'weight' for each set of questions, so that the score for each response is 'weighted' against the other responses. Tenders (bids) are scored individually and then collectively discussed. Reasons are required to be given for the scores. Feedback is shared with the successful/unsuccessful contractors.

'Weight' and 'weighting' is where the importance of an answer to a question is given a percentage, depending on the need of this part of the contractors' service to residents and the Group, in comparison to other answers.

Similarly, 'weighting' is given to the importance of costs for works against the answers to the quality of service questions.

The contractors making tenders (bids) are provided with a document detailing the weighting and background to each of the questions asked of them.

The 'weighting' for interview responses is also provided to contractors. Should the scoring process identify clear winning tenders (bids), interviews will not be necessary. For example, the 'weighting' for interviews was '10%' of the overall application process. If in the scoring stage, the leading

applicants were very unlikely or unable to over-turn the 10% gained from interview, the leading contractor would be awarded the contract, subject to reaching the minimum expected standards.

Contractors needed to reach a minimum score of 50%.

### ‘Scoring’

The residents assessed tenders (bids) using the current scoring guide:

Response Characteristic	Score
Excellent answer. Response addresses all points well and provides excellent supporting evidence / examples / information to demonstrate that the Supplier meets SHG’s requirements.	5
Good answer. Response addresses all key points well and includes good supporting evidence / examples / information to demonstrate that the Supplier meets SHG’s requirements. No significant weakness.	4
Satisfactory/ Adequate answer. Response adequately addresses all key points and includes adequate supporting evidence / examples / information to demonstrate that the Supplier meets SHG’s requirements.	3
Poor answer. Response fails to address one or more key points and / or includes inadequate supporting evidence / examples / information to demonstrate that the Supplier meets the SHG’s requirements.	2
Very poor answer. Response that contains material omissions or provides no (or inadequate) supporting evidence / examples / information to demonstrate that the Supplier meets SHG’s requirements.	1
No answer. Failed to answer the question	0

### Discussing findings

Residents and the Project Team discussed their individual scoring and identified any outcomes that were very different to each others.

The discussion of the scores enables the Project Team and residents to consider how the responses to tenders (bids) have been understood.

The discussion also enables the Project Team and residents to consider if interviews will be necessary to identify the winning tenders (bids) and if the contractors reach the standards required.

## Average duration of consultation:

### Week 1

**Day 1:** 1 hour discussing the scoring and weighting, identifying the residents' preferred way of discussing the scoring and needs to fully evaluate the tenders (bids).

**Day 2:** Residents independently assessing the tenders (bids) when available.

**Day 3:** 2 hours discussing the scoring, summarising and coming to conclusions.

### Week 2

1.5 hours meeting with the Project Lead and consultant to discuss findings and gain an overview of the Project Teams' scoring of all questions.

## Consultation findings

Due to the number of tenders (bids) received by the Project Team, the process for evaluating the bids for was amended. Residents have provided feedback to these changes under 'Any other feedback.'

The evaluation days have been titled below as Monday (Day 1), Tuesday, (Day 2), Wednesday (Day 3) and for the sharing of feedback with representatives from the Project Team, Week 2.

The two procurement trained residents were asked to review the following question for all 11 tenders (bids):

### Evaluating (Scoring):

The questions for the following themes were 'weighted' in the following ways.

Question	Theme	Weighting
A1	Planned Work	6%
A2	Responsive Work	6%
A3	Tree Surveying	5%
A4	MI & KPIs	5%
A5	Customer Engagement & Service	6%
A6	Social Value	4%
A7	Training & Skill	4%
A8	Quality Assurance	5%
Total		41%

The tender was split into 5 geographical lots as follows:



- Lot 1 – Isle of Wight
- Lot 2 – Kent
- Lot 3 – London
- Lot 4 – South
- Lot 5 - West

Bidders were given the option of expressing an interest in one or more lots (regions). However, the number of lots that can be awarded to a single bidder was limited to two. This was unless one lot had only two bidders with one of them being a clear winner. The Project Team then reviews the tenders (bids) to make an exception for a contractor to be awarded three lots.

**Residents were asked to score the following question:**

#### **QA5 – Customer Engagement & Service (6% Weighting)**

Please set out your proposals for assisting the Authority in enhancing the customer experience as part of the refreshed approach to tree management. Your response should  
This

- outline how you will ensure your operatives and management team are visible and accessible within the Authority's communities
- give details on the lines of communication you will make available to the Authority's customers, with specific reference to reporting tree issues and understanding progress against the planned programme of work

This means that a contractor receiving a score of '5' would be awarded 6% towards the final scoring.

**Discussing findings:**

**The overall leading tender (bids) received the following scores by residents to the Customer Engagement question:**

**Score: 5**

- The contractor shows that they will be interactive with SHG
- Their answer went above and beyond - customer training for all areas, aware of code of conduct re working on site and communication with residents, all workers have photo ID, prepared to work alongside HSM's, planning with councils re tree quality, information sharing with SHG and they have a SalesLogix database
- Although the photo of the SalesLogix database they planned to include was left out, it would not have made much difference as it would not have shown much more than telling us what they have

**Score 4**

- They provide clear cut examples as to what they do and they gave information about accreditation
- They mention their complaints procedures.
- Details about uniform provided.
- However, it felt like a corporate response as opposed to personalised to SHG. This is what they say to everyone
- They answered the questions and have corporate logos, clear lines of communication, clear processes/procedures in place.
- Their answer felt like a corporate response - a copy and paste from other tenders as opposed to providing a personalised response to this answer/this contract.

**Score 4**

- The contractor is prepared to review everything on a daily basis. 24/7 contact is available. They mention communication with SHG.
  - I like that they mentioned their meetings with teams that day to look at work – this is to be expected, but mentioning this is a positive.
  - They have Smart phones with photos to respond quickly.
  - They have built in flexibility with work schedules so they can stop and speak with residents to explain works.
  - They are prepared to work with residents on noise – battery powered machinery to reduce noise and they are prepared to take all factors about work noise into consideration.
  - However, they didn't reach above and beyond within their answer to the question – they didn't push this and link their response to the Group interaction.
- 
- When bidding for all lots, you would surely outweigh everything else – go one step further in your responses.
  - For all the same reasons (as Resident 1) – they ticked all necessary boxes but didn't quite go further (to be scored a 5).

One tender (bids) scored the lowest score of '0' for failing to answer the Customer Engagement question. This tender did not answer all of the questions set out by the Project Team. Therefore, the contractor was not scored as one of the leading tenders(s) (bids).

## **Any other feedback?**

### **'Customer'**

Residents told the Customer Involvement team that the term 'Customer' was found not to be the preferred wording following the Spring/Summer consultation in 2019. They would like to be referred to as 'residents' in documents shared with tenders.

### **'Authority'**

Residents told Customer Involvement that the word 'Authority' should not be used in tender(bid) documentation shared with the contractors. Customer Involvement were informed that the term 'Authority' refers to a Council, a local authority. Residents said it looked as though the terms had been copied from documents used previously for a local authority.

## **Delay to evaluation process**

Monday to Wednesday had been set aside by residents for when they were required between 10am and 4pm. The questions to mark for residents were not available until the evening of Day 1.

The two residents involved in this procurement evaluation exercise had previous experience from other procurement projects. On those projects residents received a copy of all of the questions contractors were asked and a copy of the 'requirements' of the contractors.

These documents were provided by the Project Team for the Tree Strategy when requested. Once received, the documents did not affect the scoring of the tenders (bids).

## **Getting involved**

### **Residents involved in the evaluation stage of this project told us the following:**

- Residents need to be involved in evaluating more of the questions
- The final evaluation session with overview of how scores were determined by all of the Project Team worked best for the residents
- The process of procurement evaluation is not about enjoyment, (It is about evaluating which contractor has provided the best tender)
- Borderline scores were decided once discussion had taken place with representatives of the Project Team

## Report summary

The key outcomes have been summarised and reflect majority opinion from the qualitative and quantitative data:

The tender (bid) process timeline was completed the Friday prior to the evaluation process commencing. Eleven tenders for contracts were received.

Due to the number of tenders, the Project Team decided to change the method of involvement for all Project Team members.

The Customer Involvement Team met with the residents on Day 1 of the evaluation (scoring) to talk through the scoring document shared with them by the Project Team and the 'weighting' spreadsheet. The residents were asked what their preferences were in evaluating the answers and their previous experiences of procurement processes were listened to.

The Customer Involvement Team are discussing a process with Procurement following recent projects involving residents. There are areas of all projects that have worked well and others not so well from the residents' point of view. Some flexibility will be required to assist the Project Team and residents based on the nature of the project being evaluated.

The Customer Involvement Team were not able to access the tender documents when they first became available on the afternoon of Day 1 of the evaluation process. Once IT were able to provide access, the Customer Involvement Team were asked to copy and paste the question and response from each of the 11 tender documents to enable the residents to evaluate the tenders. The document was shared and copied to the Project Lead and Consultant for transparency.

The document shared with residents also made a declaration where no response was found to a question by a tender. In addition, the Customer Involvement Team declared the process they had undertaken and informed the residents that all folders containing the tenders had been checked to ensure no appendix (supporting information) needed to be shared with them.

In deciding what documents to share with residents, the Project Lead and Consultant explored what information would enable scoring to be completed by focussing on the questions and responses. They considered the residents' reasons for wanting to review the 'requirements' of the contractors and the different sets of questions and agreed to these documents being provided.

The scoring did not change following the reviewing of these documents by the residents.

The Customer Involvement Team met with the residents on Day 3 to discuss their scores individually and then collectively where the scores were different. Any difference in scoring was marginal.

The Customer Involvement Team provided the residents with a copy of the Tree Strategy report reviewing the recommendations of the 'Current Process' consultation. This was agreed with the Project Manager ahead of confirming the responses to the Recommendations. Residents involved in the Evaluation Process asked for this document to assist their understanding of the residents' needs ahead of the potential need of interviews.

In week 2, the Customer Involvement Team joined the Project Team to listen to and understand the process involved in the decision making during the evaluation stage of a procurement process.

The residents then joined the Project Lead and Consultant to share their scores and reasons for their scoring. The Consultant took the residents through the journey of how the scoring and weighting had been decided, provided an overview of the scoring to the other questions by the other Project Team members before processing the residents' scores into the final 'weighting.'

The Consultant discussed the cost comparisons and the weighting from the questions asked of contractors. The Project Lead and Consultant asked the residents if they were in agreement with the decisions made, were happy with the findings and were satisfied that interviews were not required.

The residents found this part of the evaluation process to be the most valuable.

As part of the evaluation process, once the Project Team have shared their decisions with the contractors tendering (bidding), they are required to give the contractors time to reply. This is known as a 'stand still' period.

The consultant and the Project Team reviewed a reply from one of the contractors. When the Project Team made the initial award, one of the unsuccessful bidders highlighted that their bid had included 'for free of charge surveys. When the Project Team reviewed their cost scores they thought the contractor had not priced this cost. Therefore, their bid was considered incomplete.

When this new information was presented, the Project Team relooked at the scoring and ensured the correct tender (bid) was offered the contract for London.

The Consultation Findings in this report have been updated.

## Recommendations

These recommendations have been summarised and reflect majority opinion from the qualitative and quantitative data:

- To involve residents in the development and review of the communications to be shared with the different regions informing residents of the successful contract for their area – referring to recommendations from the ‘current process’ phase

Feedback from the Project Team:

Yes, we will provide draft communications for comment before we send it out to residents.

Information from the Customer Involvement Team:

The Project Team are working with the communications team to provide communications for residents. Involved residents will then be asked to review these.

- Provide residents and Estate Inspectors with a schedule of works planned for the area where they live

Feedback from the Project Team:

Yes, the works programmes will be agreed with contractors as part of mobilisation and copies provided to customers

- To use the term ‘resident’ in communications

Feedback from the Project Team:

This is out of scope of the tree maintenance procurement project. Our roles are part of the customer services directorate and so any changes would need to be agreed at a higher level

Information from the Customer Involvement Team:

The Customer Involvement Team have shared with the wider Group residents’ preference for ‘resident’ to be used instead of ‘Customer.’

- To provide a copy of the correspondence shared with the contractors following their tenders (bids) with the residents taking part in the evaluation process

#### Feedback from the Project Team:

We can provide copies of the text included in the letters, but not copies of the actual letters sent to contractors.

#### Information from the Customer Involvement Team:

The Consultant working with the Project Team has provided the Customer Involvement Team with the text. This will be shared with the residents that took part in the evaluation process.

- Future procurement – to consider enabling residents to discuss and share their scores with all members of the Project Team evaluating the tenders (bids)

#### Feedback from the Project Team:

This can happen for sure. It will be up to the relevant procurement consultation Project Lead to make a decision

- Future procurement – to consider sharing an overview of all questions and requirements provided to the contractors making a tender (bid) with the residents involved in the evaluation process

#### Feedback from the Project Team:

This can happen for sure. It will be up to the relevant procurement consultation Project Lead to make a decision

- Future procurement – consider using terms 'resident' and not 'customer' and 'housing association' not 'authority' in the documents provided to contractors for tenders (bids)

#### Feedback from the Project Team:

This is out of scope of the tree maintenance procurement project. Our roles are part of the customer services directorate and so any changes would need to be agreed and higher level

- Future procurement – consider the timescale between receiving the tenders (bids) and providing the documents to residents for review

#### Feedback from the Project Team:

This can happen for sure. It will be up to the relevant procurement consultation Project Lead to make a decision

- Future procurement – consider residents being involved in the evaluation of more of the questions responded to as part of the tenders (bids).

#### Feedback from the Project Team:

This can happen for sure. It will be up to the relevant procurement consultation Project Lead to make a decision

## What happens next?

Thank you for reading this report. This report is a summary of the feedback received from residents regarding the project and at this time has not been shared with them.

The Customer Involvement Team are committed to giving feedback directly to the residents who took part in this consultation and to enable us to do this could you please ensure, as the project lead, the feedback covers the following:

- How you have addressed each recommendation and if not supported why this is the case.

#### Feedback from the Project Team:

I have considered all the recommendations based on the terms of reference of the project and the improvements we are committing to within the internal GPMO (Group Portfolio Management Office) project plan

#### Information from the Customer Involvement Team:

Group Portfolio Management Office: This team helps Southern Housing Group govern, control and report on Group-wide change projects. By sharing projects with this team, the Group ensure that resources are in place once changes have been agreed following a project consultation. The changes must be in line with the purposes agreed at the beginning with the GPMO team.

- What changes have you made due to resident's feedback?

Feedback from the Project Team:

No significant changes have been made, however the tender and contract documents will be fully aligned to the recommendations submitted

- What will you be doing differently following this consultation?

Feedback from the Project Team:

As above

- What is the timeline for the changes to be implemented?

Feedback from the Project Team:

Contract management will be developed as part of mobilisation Feb-Mar 21, and customer communication to go on launch of the contract on 1<sup>st</sup> April 2021.

It is important for the contract to commence and be present in areas. Communication will be shared with residents as soon as possible afterwards.

- If it is a policy, procedure, strategy review please include the timeline for approval process.

A tree strategy will be developed in 2021 by the Estate Care team (timetable to be confirmed) and further customer consultation to be undertaken at that stage.

The next stage of the Tree Strategy will look at future tree management on matters such as regeneration, environmental, budget setting and different ways of working.

Each project will be reviewed, one year on, to see what impact this project has had following on from the outcomes.

