**ROI Environment Canterbury Response Form:** Registered Suppliers for the provision of home assessment, heating, insulation and ventilation services for Healthier Homes Canterbury.

**Instructions for Respondents**

* Please use this Response Form in responding to our Registrations of Interest (**ROI**). It is important that you do not change the structure (section headings and sequence) as this will make it harder for the evaluators to find relevant information quickly.
* Before starting to complete this form please make sure that you have read the ROI in full and understand our Requirements (ROI Section 2), our Evaluation Approach (ROI Section 3), the ROI Process and Terms and Conditions at ROI Appendix 1 and the Proposed Contract at ROI Appendix 3. If anything is unclear or you have any questions please get in touch with our Point of Contact (ROI Section 1 paragraph 1.3) before the Deadline for Questions (ROI Section 1, paragraph 1.2).
* We have included supplier tip boxes to help you understand what is required. The areas highlighted in yellow indicate where you are to write your response.
* **Remember to delete the supplier tip boxes** and remove the highlight from your answers before sending us your response – they are for your use only!

|  |  |
| --- | --- |
|  | To remove highlight from text: select the text you want to remove the highlight from. In the ‘Home’ tab in the ‘Font’ group select the arrow at the right of the ‘Text highlight colour’ and select ‘no colour’. |

* You will also need to **update the contents page**. Right click on the contents list and select ‘update field’ then ‘update the entire table’ then ‘ok’.
* This instruction page and the checklist are for your use only and should not be included as part of your ROI response.
* For more general information on how to respond to tenders refer to the suppliers’ resource centre at: www.procurement.govt.nz/for suppliers.

**Check list for Respondents**

|  |  |
| --- | --- |
| **Task** | **(tick)** |
| 1. Complete all sections of the Response Form. |  |
| 2. Delete all ‘supplier tip’ boxes from the Response Form. |  |
| 3. Remove all yellow highlight from the Response Form. |  |
| 4. Arrange for the declaration to be signed. |  |

|  |  |
| --- | --- |
| **Item** | **(tick)** |
| **General Requirements** |  |
| * Completed ROI Response Form
 |  |
| **Evaluation Criteria** |  |
| * Track Record /Relevant Experience
 |  |
| * Methodology
 |  |
| * Relevant Skills
 |  |
| * Product Range
 |  |
| * Capacity and Availability
 |  |
| * Range of Services to be Provided and Regions
 |  |
| * Conditions to Proposed Contract, if any.
 |  |
| **Other Requirements** |  |
| * Referee Details
 |  |
| * Declaration
 |  |
| * Conflict of Interest Declaration, if applicable.
 |  |



**Environment Canterbury Response Form**

In response to the call for Registrations of Interest

by: Environment Canterbury

for: Registered Suppliers for the provision of home assessment, heating, insulation and ventilation services for Healthier Homes Canterbury.

ref: 1227-19/20

Date of this Registration: [insert date of this document]

|  |  |
| --- | --- |
| **Supplier tips** | Words and phrases that have a special meaning are shown by the use of capitals e.g. Respondent, which means *‘a person, organisation, business or other entity that submits a ROI Response in response to the ROI. The term Respondent includes its officers, employees, contractors, consultants, agents and representatives. The term Respondent differs from a supplier, which is any other business in the market place that does not submit a Registration’.* Definitions are at the end of ROI Appendix 1. |

**Contents**

[1 About the Respondent 5](#_Toc521485905)

[1.1 Our Profile 5](#_Toc521485906)

[1.2 Our Point of Contact 6](#_Toc521485907)

[2 Response to the Requirements 7](#_Toc521485908)

[2.1 Pre-conditions 7](#_Toc521485909)

[2.2 Overview of our solution 8](#_Toc521485910)

[2.3 Questions relating to the evaluation criteria 9](#_Toc521485911)

[2.4 Assumptions 14](#_Toc521485912)

[3 Price 14](#_Toc521485913)

[3.1 Pricing Schedule 14](#_Toc521485914)

[3.2 Assumptions 15](#_Toc521485915)

[3.3 Interest in Attending a HPA Training Course 16](#_Toc521485916)

[4 Proposed Contract 17](#_Toc521485917)

[5 Referee details 18](#_Toc521485918)

[6 Our Declaration 19](#_Toc521485919)

# 1 About the Respondent

|  |  |
| --- | --- |
| **Supplier tips** | * The section gives Environment Canterbury basic information about your organisation and identifies your Point of Contact for the duration of the ROI process.
* If an item is not applicable e.g. you do not have a registered office, complete the box by stating ‘not applicable’.
* If you are submitting a joint or consortium ROI Response complete an ‘Our profile’ table for each Respondent. Cut and paste the table as appropriate. Provide only one Point of Contact for your joint/consortium ROI Response.
 |

## 1.1 Our Profile

Choose one of these statements to complete, and delete the others

This is a ROI Response by [insert the name of your organisation] (the **Respondent**) alone to supply the Requirements. OR

This is a [joint/consortium] ROI Response, by [insert the name of your organisation] and [insert the name of the other organisation/s] (together the **Respondents**) to supply the Requirements.

|  |  |
| --- | --- |
| **Item** | **Detail** |
| Trading name: | [insert the name that you do business under] |
| Full legal name (if different): | [if applicable] |
| Physical address: | [if more than one office – put the address of your head office] |
| Postal address: | [e.g. P.O Box address] |
| Registered office: | [if you have a registered office insert the address here] |
| Business website: | [url address] |
| Type of entity (legal status): | [sole trader / partnership / limited liability company / other please specify] |
| Registration number: | [if your organisation has a registration number insert it here e.g. company registration number or NZ Business Number] |
| Country of residence: | [insert country where you (if you are a sole trader) or your organisation is resident for tax purposes] |
| GST registration number: | [NZ GST number / if overseas please state] |

## 1.2 Our Point of Contact

|  |  |
| --- | --- |
| **Item** | **Detail** |
| Contact person: | [name of the person responsible for communicating with Environment Canterbury] |
| Position: | [job title or position] |
| Phone number: | [landline] |
| Mobile number: | [mobile] |
| Email address: | [work email] |

# 2 Response to the Requirements

|  |  |
| --- | --- |
| **Supplier tips** | * In this section you are asked to provide your response to our Requirements (ROI Section 2) by demonstrating your organisation’s ability to meet our criteria (ROI Section 3: Our Evaluation Approach). Carefully read ROI Sections 2 and 3 before completing this part.
* If there is anything that you do not understand ask our Point of Contact to clarify.
* If any information you provide is commercially sensitive to your business you must let Environment Canterbury know. Please mark the information ‘commercially sensitive’ or ‘Confidential Information’. It is not acceptable to render this whole document confidential unless this is truly the case. Environment Canterbury has a duty to protect Confidential Information, subject to the exceptions in the ROI-Terms (Appendix 1, ROI).
* If some of an answer is in another document e.g. a marketing brochure, copy and paste the relevant extract into this ROI Response. Do not submit the whole brochure. Please do not include any advertising brochures or similar material in your ROI Response.
* You may include information not specifically requested by us in your ROI Response. But only if it adds value and is relevant to the Requirements.
 |

## 2.1 Pre-conditions

|  |  |
| --- | --- |
| **Supplier tips** | * You must be able to answer ‘yes’ to each of these pre-conditions. Make sure you are able to verify that this is the case, if asked.
* ‘Yes’ means that you can currently meet the pre-condition. It does not mean that you are planning to, or intend to at some time in the future.
* If you cannot answer ‘yes’ to all, your ROI Response will not meet the basic Requirements and will be declined.
 |

|  |  |  |
| --- | --- | --- |
| **No.** | **Pre-condition** | **Meets** |
| 1. | Respondents must supply a copy of a current certificate of Public and Products Liability Insurance, with a minimum cover of $2,000,000. | Yes/No |
| 2. | Respondents must have a documented health and safety management system that has been externally audited against a recognised national or international standard. | Yes/No |

## 2.2 Overview of our solution

Please provide an overview of your solution. For example, summarise your product range, your relevant experience, processes and proposed methodology etc that you intend to use for the delivery of services for the Healthier Homes Canterbury Scheme.

|  |
| --- |
| [Respondent to insert your answer here] |

## 2.3 Questions relating to the evaluation criteria

|  |  |
| --- | --- |
| **Supplier tips** | * Here you are asked to answer questions relating to the evaluation criteria. Your ROI Response will be scored against your answers to these criteria. Aim to give answers that are relevant, concise and comprehensive.
* Consider the % weighting for each criterion. The higher the weighting the more important it is. Take the weightings into account in deciding how much detail to include.
* If you have made any assumption about the Requirements or delivery, clearly state the assumption.
* There may be several questions that relate to one criterion. If these questions are not individually weighted assume that they are of equal importance.
 |

|  |  |
| --- | --- |
| 1. **Track Record/Relevant Experience**
 | **Weighting 25%** |
| Please provide details of your track record in projects of a similar scale and design e.g. for Councils or Government agencies. Explain how your products and services have met or exceeded the requirements. In particular, we are looking for evidence of client satisfaction with regard to the quality of service and how you have worked with the relevant homeowners.The Respondent shall provide details of the last two relevant projects and covering as far as possible, the range of activities included in the ROI. The following items shall be described in tabular form: * Client
* Name and type of project.
* Value and duration of project.
* Compliance with quality standards. Yes/No\*
* Completed by due date or authorised extension. Yes/No\*
* Completed to target performance levels. Yes/No\*
* Comment on client satisfaction with regard to quality of installation, communication and meeting the timetable requirements.

Note: \*Qualifying comments may be included as warranted when the answers are not simply a yes or no. |
| [Respondent to insert your answer here] |
| Please provide details of the relevant experience of your organisation and the individuals to be involved in the scheme to indicate their suitability for the work in this field. The relevant experience of any proposed subcontractors shall also be supplied. Experience relates to the proposing company and individuals within the company. In the case of newly formed firms or consortia, consideration may be given to the relevant experience held by the named personnel who are proposed for the scheme. Relevant experience will, ideally, include heating and/or insulation projects involving many homes for local Government, central Government or other large organisations.  |
| [Respondent to insert your answer here] |

|  |  |
| --- | --- |
| 1. **Methodology**
 | **Weighting 25%** |
| Please provide details of the methodology you propose to achieve the specified end result. This methodology should address, but not be limited to, each of the following points: 1. Management and staffing structure for this scheme.
2. Demonstration of an understanding of requirements.
3. Ensuring quality of installation (quality assurance).
4. How you will ensure the health and safety of your staff and the participating homeowners, including relevant summary details of your externally audited health and safety management system that would be applied to this contract.
5. Programming and tracking – include a proposed timeline for heating/insulation installation from receiving a home assessment request from Environment Canterbury through to the Post Installation Audit.
6. Supervision.
7. Detail how you would engage with other registered suppliers and the homeowner in cases where two suppliers need to provide measures for a particular home in a co-ordinated manner.
8. Reporting/invoicing systems to meet Environment Canterbury’s requirements and EECA’s requirements, where relevant.
9. How you ensure that your staff and/or subcontractors provide excellent customer service.
10. How you intend to engage with the homeowners and tenants to ensure that they understand the services that you will provide.
11. How you will deal with, manage and resolve any homeowner complaints, issues and disputes and/or corrective audit measures.
12. How you will manage sub-contractor relationships, where relevant.
 |
| [Respondent to insert your answer here] |

|  |  |
| --- | --- |
| 1. **Relevant Skills**
 | **Weighting 20%** |
| Please nominate all key personnel describing each by name, position, qualifications, technical skills and length of experience. These details should indicate each person’s proposed involvement with the scheme and demonstrate that their experience and skills, in particular technical experience and skills, are compatible with the scheme.Please comment on the communication skills of the staff who would be engaging with homeowners to ensure that the work is done with minimal disruption and inconvenience to the homeowners and that they are capable of explaining details of the operation of the heater to the homeowners and/or tenants. Where relevant note whether staff have successfully completed any training or accreditation relevant to this scheme such as HPA assessor training, IAONZ training or whether they are accredited as a Solid Fuel Appliance Installation Technician by the New Zealand Home Heating Association. |
| [Respondent to insert your answer here] |

|  |  |
| --- | --- |
| 1. **Product Range**
 | **Weighting 15%** |
| Please provide an overview of the products that you propose to supply e.g. the types of heating/insulation/ventilation products and brands that you are able to offer, general comment on product warranties, performance etc.Confirm that all heating and/or insulation products will be listed on the relevant lists of accepted or authorised products maintained by ECan and/or EECA.Note that a full product listing is not required. |
| [Respondent to insert your answer here] |
| For brands being provided, please indicate your level of relationship and length of relationship with the supplier or manufacturer, commenting specifically on your ability to: (a) Maintain stock levels and/or ensure continuity of supply and delivery and service in the parts of the Canterbury region that you propose to be involved in; (b) Resolve any warranty or performance issues quickly.(c) Outline your organisation’s specific history with the supply of this product. |
| [Respondent to insert your answer here] |

|  |  |
| --- | --- |
| 1. **Capacity/Availability**
 | **Weighting 15%** |
| The Respondent should indicate the capacity of their organisation to manage varying rates of heating and/or insulation installations and/or assessments from month to month. |
| [Respondent to insert your answer here] |

Table 1: Range of Services to be Provided and Regions:

Please indicate the services that you propose to offer to the Healthier Homes Canterbury scheme and the regions that you could provide those services in by placing ticks in the table below. If you are able to offer services in all regions throughout Canterbury simply place ticks in the row entitled “All regions listed below”.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Assessments** | **Insulation** | **Heating Options** | **Ventilation systems** | **Heat transfer systems** | **Burner de-commissioning** | **Additional services\*** |
| **Region** |  |  | **Woodburners** | **Pellet fires** | **Heat pumps** | **Gas fires** |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **All regions listed below** |  |  |  |  |  |  |  |  |  |  |
| [Christchurch](http://www.ccc.govt.nz/)  |  |  |  |  |  |  |  |  |  |  |
| Banks Peninsula |  |  |  |  |  |  |  |  |  |  |
| [Ashburton](http://www.ashburtondc.govt.nz/)  |  |  |  |  |  |  |  |  |  |  |
| [Hurunui](http://www.hurunui.govt.nz/)   |  |  |  |  |  |  |  |  |  |  |
| [Kaikoura](http://www.kaikoura.govt.nz/)  |  |  |  |  |  |  |  |  |  |  |
| [Mackenzie](http://www.mackenzie.govt.nz/)  |  |  |  |  |  |  |  |  |  |  |
| [Selwyn](http://www.selwyn.govt.nz/)  |  |  |  |  |  |  |  |  |  |  |
| [Timaru](http://www.timaru.govt.nz/)  |  |  |  |  |  |  |  |  |  |  |
| [Waimakariri](http://www.waimakariri.govt.nz/)  |  |  |  |  |  |  |  |  |  |  |
| [Waimate](http://www.waimatedc.govt.nz/)  |  |  |  |  |  |  |  |  |  |  |
| [Waitaki](http://www.waitaki.govt.nz/)  |  |  |  |  |  |  |  |  |  |  |

\*e.g. subsidies, grants, advice. Please specify below:

|  |
| --- |
|  |

## 2.4 Assumptions

Please state any assumptions you have made in relation to the Requirements. Where you have made assumptions in relation to the costs and pricing information please state these in the next section.

|  |
| --- |
| [Respondent to insert your answer here] |

# 3 Price

|  |  |
| --- | --- |
| **Supplier tips** | * In the ROI Section 4 we have outlined the pricing information that we are seeking. This should inform you how to present your proposed price. Where we have provided a template you must use this for your pricing information.
* In preparing your pricing information you must consider all risks, contingencies and other circumstances relating to the delivery of our Requirements and include adequate provision for them. You must also document any assumptions that you have made in costing the full delivery of the Requirements.
 |

## 3.1 Pricing Schedule

Pricing is not required for the various heating, insulation and ventilation measures that will be supplied through Healthier Homes Canterbury. This will be a matter for registered suppliers to quote for participating homeowners on a case by case basis.

For suppliers wishing to carry out full Home Performance Advisor (HPA) home assessments, we require a unit price per assessment for these.

**Assessment Pricing:**

Please provide your proposed price to carry out a full Home Performance Adviser qualified assessment as defined in Appendix 4 of the ROI.

If you propose to charge a different assessment fee for assessments in different regions, please show your base fee in the table below and address any proposed regional surcharges in the following table.

|  |  |
| --- | --- |
|  | **Full HPA Assessment** |
| Proposed cost per assessment (excl GST) |  |

Please provide further comment below about the regions that this fee would apply to, what basis you would use for applying any surcharges for particular regions and the extent, if any, to which you would be willing to refund the cost of an assessment if the homeowner subsequently purchased heating and/or insulation from you.

Also note whether you also propose to offer a shortened version of a full HPA assessment, to be based on the principles of the full HPA assessment, where this might be appropriate for certain situations.

|  |
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## 3.2 Assumptions

Please state any assumptions you have made in relation to the cost and pricing information.

|  |
| --- |
| [Respondent to insert your answer here] |

## 3.3 Interest in Attending a HPA Training Course

Environment Canterbury is willing to co-ordinate a 2 ½ day HPA training course in Canterbury in late 2018 if there is sufficient interest.

Please note below whether you would be interested in participating in this training, how many attendees may come from your organisation and a preferred location e.g. Christchurch, Timaru etc. This will not commit you to attending, but will be helpful in planning a training course.

Yes, I’m interested in attending: 

Likely number of attendees: \_\_\_

Preferred location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# 4 Proposed Contract

|  |  |
| --- | --- |
| **Supplier tips** | * In the ROI, Appendix 3 we have included a copy of the Proposed Contract which is based on the standard EECA service provider contract for VTR schemes. We need to know whether or not you are prepared to do business based on the Proposed Contract.
* If you have any points that you wish to make about the Proposed Contract this is where you tell us. Otherwise we will consider your ROI Response to be an offer to supply services on the basis of the Proposed Contract. Please note below any suggestions or changes you wish to propose.
* It is important that, if asked, you are able to explain why your changes are important to you.
* In deciding which Respondent/s to shortlist Environment Canterbury will take into account each Respondent’s willingness to meet the Proposed Contract terms and conditions.
 |

Choose one and delete the other:

Having read and understood the Proposed Contract, in the ROI, Appendix 3, I confirm that these terms and conditions are acceptable. If successful, I agree to sign a Contract based on the Proposed Contract, or such amended terms and conditions of Contract as are agreed with Environment Canterbury following negotiations]. OR

Having read and understood the Proposed Contract, in the ROI, Appendix 3, I have the following suggestions to make. If successful, I agree to sign a Contract based on the Proposed Contract subject to negotiating the following clauses:

|  |  |  |
| --- | --- | --- |
| **Clause** | **Concern** | **Proposed solution** |
| [insert number] | [briefly describe your concern about this clause] | [describe your suggested alternative wording for the clause or your solution] |
| [insert number] | [briefly describe your concern about this clause] | [describe your suggested alternative wording for the clause or your solution] |

# 5 Referee details

|  |  |
| --- | --- |
| **Supplier tips** | * Here you are asked to provide the names and contact details of your referees. These must be work related referees i.e. not a friend or family member.
* The best referees are those for whom you have recently delivered similar goods or services.
* Before including their details check with them to make sure that they consent to acting as referee on behalf of your organisation.
 |

Please supply the details of two referees for your organisation. Include a brief description of the goods or services that your organisation provided and when.

Please note: in providing these referees you authorise us to collect any information about your organisation, except commercially sensitive pricing information, from the referees, and use such information in the evaluation of your Registration. You also agree that all information provided by the referee will be confidential to us, subject to Environment Canterbury’s obligations to disclose information under the Local Government Official Information and Meetings Act 1987.

|  |
| --- |
| **First referee** |
| Name of referee | [insert name of referee] |
| Name of organisation:  | [insert name of their organisation] |
| Goods/services provided: | [brief description of the goods/services you provided to this referee] |
| Date of provision: | [insert the date when you provided the goods/services] |
| Address: | [insert street address] |
| Telephone: | [insert mobile or landline] |
| Email: | [insert email address] |
| **Second referee** |
| Name of referee | [insert name of referee] |
| Name of organisation: | [insert name of their organisation] |
| Goods/services provided: | [brief description of the goods/services you provided to this referee] |
| Date of provision: | [insert the date when you provided the goods/services] |
| Address: | [insert street address] |
| Telephone: | [insert mobile or landline] |
| Email: | [insert email address] |

# 6 Our Declaration

|  |  |
| --- | --- |
| **Supplier tips** | * Here you are asked to answer questions and make a formal declaration.
* Remember to select ‘agree’ or ‘disagree’ at the end of each row. If you don’t you will be deemed to have agreed.
* Remember to get the declaration signed by someone who is authorised to sign and able to verify each of the elements of the declaration e.g. chief executive or a senior manager.
* If you are submitting a joint or consortium ROI Response each Respondent (supplier involved in the joint or consortium ROI Response) must complete a separate declaration.
 |

|  |
| --- |
| **Respondent’s declaration** |
| **Topic** | **Declaration** | **Respondent’s Declaration** |
| **ROI Process, Terms and Conditions:** | I/we have read and fully understand this ROI, including the ROI Process, Terms and Conditions (shortened to ROI-Terms detailed in Appendix 1, as amended by Section 1, paragraph 1.6. if applicable). I/we confirm that the Respondent/s agree to be bound by them. | [agree/disagree] |
| **Collection of further information:** | The Respondent/s authorises Environment Canterbury to:a. collect any information about the Respondent, except commercially sensitive pricing information, from any relevant third party, including a referee, or previous or existing clientb. use such information in the evaluation of this ROI Response.The Respondent/s agrees that all such information will be confidential to Environment Canterbury. | [agree/disagree] |
| **Requirements:** | I/we have read and fully understand the nature and extent of Environment Canterbury’s Requirements as described in Section 2. I/we confirm that the Respondent/s has the necessary capacity and capability to fully meet or exceed the Requirements and will be available to deliver throughout the relevant Contract period. | [agree/disagree] |
| **Ethics:** | In submitting this ROI Response the Respondent/s warrants that it: a. has not entered into any improper, illegal, collusive or anti-competitive arrangements with any Competitorb. has not directly or indirectly approached any representative of Environment Canterbury (other than the Point of Contact) to lobby or solicit information in relation to the ROI c. has not attempted to influence, or provide any form of personal inducement, reward or benefit to any representative of Environment Canterbury. | [agree/disagree] |
| **Offer Validity Period:** | I/we confirm that this ROI Response, including any prices supplied, remains open for acceptance for the Offer Validity Period stated in Section 1, paragraph 1.6.  | [agree/disagree] |
| **Conflict of Interest declaration:** | The Respondent warrants that it has no actual, potential or perceived Conflict of Interest in submitting this ROI Response, or entering into a Contract to deliver the Requirements. Where a Conflict of Interest arises during the ROI process the Respondent/s will report it immediately to Environment Canterbury’s Point of Contact. | [agree/disagree] |
| **Details of conflict of interest:** [if you think you may have a conflict of interest briefly describe the conflict and how you propose to manage it or write ‘not applicable’]. |
| **DECLARATION****I/we declare that in submitting the ROI Response and this declaration:****a. the information provided is true, accurate and complete and not misleading in any material respect****b. the ROI Response does not contain intellectual property that will breach a third party’s rights****c. I/we have secured all appropriate authorisations to submit this ROI Response, to make the statements and to provide the information in the ROI Response and I/we am/are not aware of any impediments to enter into a Contract to deliver the Requirements.****I/we understand that the falsification of information, supplying misleading information or the suppression of material information in this declaration and the Registration may result in the ROI Response being eliminated from further participation in the ROI process and may be grounds for termination of any Contract awarded as a result of the ROI.****By signing this declaration the signatory below represents, warrants and agrees that he/she has been authorised by the Respondent/s to make this declaration on its/their behalf.** |
| **Signature:** |  |
| **Full Name:** |  |
| **Title / position** |  |
| **Name of Organisation:** |  |
| **Date:** |  |