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Tender

## **OG -Customer Insight Research - PP1066**

Orbit Group Limited

F02: Contract notice

Notice identifier: 2024/S 000-008049

Procurement identifier (OCID): ocds-h6vhtk-04482b

Published 13 March 2024, 2:41pm

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

Orbit Group Limited

Garden Court, Harry Weston Road, Binley Business Park

Coventry

CV3 2SU

#### **Contact**

Mr Kieron finnegan

#### **Email**

[kieron.finnegan1@orbit.org.uk](mailto:kieron.finnegan1@orbit.org.uk)

#### **Telephone**

+44 8006781221

#### **Country**

United Kingdom

**Region code**

UK - United Kingdom

**Internet address(es)**

Main address

<http://www.orbit.org.uk>

Buyer's address

<http://www.orbit.org.uk>

**I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

[www.orbit.org.uk](http://www.orbit.org.uk)

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

[www.orbit.org.uk](http://www.orbit.org.uk)

**I.4) Type of the contracting authority**

Body governed by public law

**I.5) Main activity**

Housing and community amenities

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## **Section II: Object**

### **II.1) Scope of the procurement**

#### **II.1.1) Title**

OG -Customer Insight Research - PP1066

Reference number

DN715463

#### **II.1.2) Main CPV code**

- 79310000 - Market research services

#### **II.1.3) Type of contract**

Services

#### **II.1.4) Short description**

Orbit is looking to procure the services of a Market Research Society Approved Provider to assist with delivery of its Customer Insight Research Programme. The work will incorporate delivery of 3 separate projects per year with the provider delivering an agreed number of indepth telephone interviews with Orbit customers. Tenderers are requested to study this specification document in detail to ensure that the requirements can be met and also reflected in your Pricing Schedule.

The contract for the provision of the service is expected to commence June 2024 with the exact dates to be agreed depending on the agreement between the successful provider and Orbit.

The Contract will be awarded for a period of two years with potential for a one-year extension.

#### **II.1.6) Information about lots**

This contract is divided into lots: No

### **II.2) Description**

#### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

#### **II.2.4) Description of the procurement**

Orbit has always been committed to delivering a service that is customer focussed. But the relaunch of Business Strategy through to 2030 will see a significant change in the way we connect with our customers. Though putting the customer voice at the heart of the organisation, we will focus our priorities on the things customer have asked for.

We will continue to support customers to access affordable housing through a range of options, providing support with tenancies, wellbeing, money and skills as customer's lives change.

With 90% of customers online, we will introduce a high-quality digital experience, that will give customers the ability to complete transactions relating to their home, tenancy or support quickly and access information easily. Where customers prefer they will be able to speak directly with colleagues through our support centres and schemes.

To ensure we are on track with our plans we will use a variety of mechanisms to check in with customers and make sure we remain focussed on services and improvements that matter to them. Our Customer Insight Research programme will add weight to existing feedback mechanisms which include:

- Transactional feedback immediately after a customer has experienced a service sought via text/email and IVR. We annually capture c30k pieces of data via this real time feedback channel
- Perceptions surveys – both Tenant Satisfaction Measures (as required by the Regulator of Social Housing) and UKCSI with the Institute of Customer Service
- Engagement via our digital platform (My Voice) enabling customers to engage with services/ communities and have a conversation with other engaged customers

Our Customer Insight Research Programme enables us to undertake a deeper dive into issues/subject areas that will help us build a richer picture and knowledge about our customers and their interaction with Orbit. The method used for seeking this insight will be indepth telephone interviews conducted with customers, 3 projects completed annually each exploring a separate subject area.

Findings from this Customer Insight Research programme feed into our regular Customer Voice updates shared with Senior Management Teams, Boards and Customers helping us better understand what we need to focus on to further improve our customer service. It also provides evidence and insight to underpin delivery of our Business Plans.

### 3.3 The Customer Insight Research Programme in more detail

1. The Programme will comprise 3 separate projects conducted in the summer/autumn and winter. Each project will focus on a different subject area/theme. In-depth interviews will be conducted by telephone (CATI) with the average individual survey length anticipated to be no more than 16 minutes. The survey will allow for a maximum of 20 closed questions and 4 open questions per project.
2. Each project will seek views from around 850 customers (this will include owners and renters). Views will need to be obtained from a representative sample of customers (based on age profile; tenure description; location; household size & ethnicity)

### 3.4 Key Requirements and Deliverables

The successful supplier will be expected to deliver the following requirements:

2. Provide a key contact who will work with Orbit for the duration of the contract to deliver this programme.
3. Work with Orbit to finalise questions and scripting for the in depth interviews, providing guidance and advice re wording and survey flow to ensure that each project delivers the maximum insight. Orbit will set out initial questions and themes.
4. Undertake a short pilot project ahead of each project go live to test the questions and customers understanding of the questions, to check survey routing and to confirm that the questions meet the project outcomes.
5. Provide a secure portal/ product that meets the requirements of Orbit's Information Governance Team for the purposes of uploading sample lists and sharing results and outputs ensuring data is accessed and stored in a safe and secure way which is GDPR compliant.
6. Ensure that adequate processes are in place to achieve the desired quotas for demographic variables determined by Orbit to ensure results are representative. These would cover variables such as: tenure; age; ethnicity, bed size & geographic location etc.
7. Conduct and complete the required number of telephone interviews per project. Conducting fieldwork to the agreed timetable listed under KEY DATES. No calls to be made before 10am and no calls after 8pm. Fieldwork to be conducted Monday to Saturday inclusive (where Saturday is a normal working day for your business).
8. Complete fieldwork in line with Market Research Society Guidelines with the project conducted in accordance with the Market Research Society's code of conduct including a commitment to respondent confidentiality. All data processing in accordance with GDPR

regulations.

9. Provide interviewers who as a minimum are properly trained and supervised in line with the Interviewer Quality Control Scheme (IQCS) the Industry mark of field excellence.

10. Provide access to translation services where respondent maybe non - English speaking customers (Orbit will identify these customers within sample lists).

11. Have clear internal policies and processes (to be shared with Orbit) to monitor and evaluate the quality of completed interviews, with the ability to record and recall any calls if required within 4 weeks of fieldwork closing down.

12. Provide weekly updates on quotas and response rates whilst fieldwork is underway.

13. Provide staff who are trained to respond empathetically to customers and are able to handle vulnerable customers, accessibility needs and sensitive conversations. Establish and implement a minimum daily notification system for the duration of each fieldwork period alerting Orbit to any significant Health and Safety issues (red flag procedure) raised by respondents or for highlighting extreme cases of dissatisfaction which necessitate an immediate response from Orbit.

14. Results to be returned to Orbit using excel, with full responses listed. Full verbatim comments to be captured for all open ended questions – where possible additional coding to be applied to verbatim questions. Additional demographic variables to be appended to responses where the customer has given permission to allow for more in depth analysis of results.

15. After completion of each project return to Orbit a list of invalid telephone numbers that have been discovered in the fieldwork, together with corresponding customer ID – this will enable Orbit to cleanse and update its customer data.

### 3.5 Project Length

This project will be awarded for an initial 2 year period running from June 2024 with the possibility to extend for a further 1 x 12 months subject to performance, available budget and spend. There are no guaranteed volumes or spend

Orbit will:

- Provide a key contact who will liaise with the company for the duration of the project
- Provide the theme for each Insight project and proposed questions for the indepth telephone interviews

- Provide a sample list of households from which agreed quotas will be derived
- Ensure invoices are processed promptly in line with the contract terms
- Ensure any changes to the specification are confirmed & agreed

### 3.6 Timeline for each Customer Insight Research Project (exact dates to be agreed )

3 projects completed annually: one between June and August, one between September and December and one between January and March. Each project with a 14 weeks in overall length from initiation to close out meetin

#### Responsibility Activity Timeline

Orbit Share project theme, desired outcomes and questions 5 weeks ahead of go live

Both Meeting to review questions \* 4 weeks ahead of go live

Supplier Script agreed ready for testing 2 weeks ahead of go live

Supplier Pilot questions with customers 1 week ahead of go live

Both Review pilot and refine questions for go live

Orbit Sample and Quotas provided 2 weeks ahead of pilot

Supplier Fieldwork commences Duration 4 weeks

Supplier Clean set of results shared following checks and validation Within 1 week of fieldwork closing

Both Close out meeting to identify learnings/ issues from project \* Within 4 weeks of fieldwork closing

\*meetings via Teams – one hour max for initial meeting and 30 minutes for close out meeting

#### **II.2.5) Award criteria**

Quality criterion - Name: Quality / Weighting: 50

Cost criterion - Name: Pricing / Weighting: 50

#### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months

24

This contract is subject to renewal

Yes

Description of renewals

This is a 24 months contract with an option for us to extend for a further 12 months

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: No

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Open procedure

#### **IV.1.8) Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: No

### **IV.2) Administrative information**

#### **IV.2.2) Time limit for receipt of tenders or requests to participate**

Date

19 April 2024

Local time

5:00pm

#### **IV.2.4) Languages in which tenders or requests to participate may be submitted**

English

#### **IV.2.7) Conditions for opening of tenders**

Date

21 April 2024

Local time

9:00am

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: No

### **VI.4) Procedures for review**

#### **VI.4.1) Review body**

Public Procurement Review Service

London

Country

United Kingdom