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Tender

## **Business Systems Refresh Programme**

Cartrefi Conwy Cyfyngedig

UK4: Tender notice - Procurement Act 2023 - [view information about notice types](#)

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## **Scope**

### **Description**

Cartrefi Conwy is an independent not-for-profit Registered Social Landlord (RSL). We formed as result of the transfer of around 3,800 homes from Conwy County Borough Council in 2008.

Since the transferred homes have been under our ownership and management we have invested heavily in their refurbishment to bring them up to the Welsh Housing Quality Standard. We will continue to maintain our homes to this high standard in the future.

In 2015 Cartrefi Conwy established Creating Enterprise C.I.C. as a wholly owned subsidiary which operates as a social enterprise."

Find out more about us, including our recently published Together Corporate Plan and other background information by visiting <https://cartreficonwy.org/>

Following a strategic review of existing IT systems, it became clear that it will not be possible for us to achieve our strategic ambitions using the existing mix of systems, processes and information.

The business systems refresh programme is underway and has full approval from the Executive and Board. Its objectives include:

1. Improved service offerings to residents, including digital / self-service, leading to increased satisfaction ratings
2. The solution / system will allow resource to be more focused on customer-facing activity and enhance the "one team" ethos
3. Data and processes to be standardised and automated to make it easier for staff to work, be proactive, productive and collaborate
4. Moving closer to OVOTT, and making data available, transparent and easier to access / use, creating a 360° view of customers and assets
5. Improved management of operational risk and compliance
6. Access to the necessary data to inform asset investment decision making
7. Appropriate use of spreadsheets
8. Availability of system capabilities and performance not dependent on location or access method
9. Enable workflows and reports to be built more easily, not necessarily by IT

Our objective is to achieve live operation of at least the first tranche of new capability within 12 months from Contract signature.

In addition, we have identified other objectives for the new HMS / PMS / AMS / FMS, and we wish to procure:

1. 'Commercial off the Shelf' product sets only requiring configuration or parameterisation, not customisation, to meet our needs.
2. Solutions with a single 'look and feel' to the User Interface across all system 'modules'
3. A system that is easy to use, requiring minimal 'clicks' or steps to navigate around or use the system. (Note that ease of use is a key negative with the current systems.)
4. A system with a modern underlying 'technical architecture', with in-built mobility ('mobile first' as a design principle), automation / workflows, and digital capabilities.
5. Superior integration capabilities to enable easy data sharing with other systems, and technically straightforward adoption of emerging and future technologies.
6. Integration with Microsoft's Office365 suite of capabilities.

7. Capabilities that can enable us easily to build processes (workflows) to support other areas of our operation.

Not achieving these objectives, or a sub-optimal version of them, represents downstream technical, commercial and operational risk to us. As such, these elements will be explored in detail at ITT stage and form a critical part of our evaluation of a Potential Supplier's capability to meet these objectives.

Our requirements are detailed in the ITT documents. Note that we will not accept responses from Potential Suppliers for part solutions, the scope of each Lot can be considered as a single 'solution'. However, that does not preclude partnering with third-parties to deliver the overall solution.

We want a long-term partnership with the successful provider(s), the Contract will be for a period of 10 years with the option to extend annually up to a further 5 years at Cartrefi's sole discretion. The Contract values given in this Tender Notice reflect a 15-year term.

### **Total value (estimated)**

- £3,992,000 excluding VAT
- £4,790,400 including VAT

Above the relevant threshold

### **Contract dates (estimated)**

- 1 July 2026 to 30 June 2036
- Possible extension to 30 June 2041
- 15 years

Description of possible extension:

5 annual renewals

## **Options**

The right to additional purchases while the contract is valid.

Additional functionality provided as part of the service offer

## **Main procurement category**

Goods

## **CPV classifications**

- 48000000 - Software package and information systems

## **Contract locations**

- UKL13 - Conwy and Denbighshire
- 

## **Lot 1. Housing Management System (HMS)**

### **Description**

Supply and implementation of software covering all aspects of housing operations, for example;

- o Lettings and allocations
- o Tenancy management, including CRM / Contact Management

- o Case and workload management
- o Revenue and debt management, including service charges
- o Workforce mobility
- o Digital and self-service capabilities including customer portal / app
- o Automation and end-to-end workflow
- o Dashboards and management information.

### **Lot value (estimated)**

- £1,757,000 excluding VAT
- £2,108,400 including VAT

### **Same for all lots**

CPV classifications, contract locations, contract dates and options are shown in the Scope section, because they are the same for all lots.

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## **Lot 2. Property Management System (PMS)**

### **Description**

Supply and implementation of software covering all aspects of property management, for example;

- o Reactive repairs including scheduling and job management
- o Voids management (property aspects)
- o Workforce mobility

- o Digital and self-service capabilities including customer portal / app
- o Automation and end-to-end workflow
- o Dashboards and management information.

### **Lot value (estimated)**

- £1,002,000 excluding VAT
- £1,202,400 including VAT

### **Same for all lots**

CPV classifications, contract locations, contract dates and options are shown in the Scope section, because they are the same for all lots.

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## **Lot 3. Asset Management System (AMS)**

### **Description**

Supply and implementation of software covering all aspects of asset management, for example;

- o Strategic asset management
- o Servicing and compliance
- o Planned maintenance
- o Workforce mobility
- o Digital and self-service capabilities including customer portal / app
- o Automation and end-to-end workflow

- o Dashboards and management information.

### **Lot value (estimated)**

- £530,000 excluding VAT
- £636,000 including VAT

### **Same for all lots**

CPV classifications, contract locations, contract dates and options are shown in the Scope section, because they are the same for all lots.

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## **Lot 4. Finance Management System (FMS)**

### **Description**

Supply and implementation of software covering all aspects of financial operations, for example;

- o Case management and workflow for approvals, queries, or issue resolution
- o Expenses management (workflows, approvals, payment)
- o Purchase to Pay with automated links to budgets, with GRN, invoice matching, and payment
- o A portal for suppliers to be registered, maintain up to date details, and access capabilities including raising queries, submitting invoices and automatic updates on payment status
- o Project Accounting for capital spend and other investments
- o Management accounts for report distribution
- o Making Tax Digital including the ability to manage partial exemptions

- o CIS
- o Chart of Accounts
- o Accounts Payable / Receivable
- o Cash management
- o General Ledger
- o Journals
- o Creditor Management
- o Bank Reconciliation.

### **Lot value (estimated)**

- £703,000 excluding VAT
- £843,600 including VAT

### **Same for all lots**

CPV classifications, contract locations, contract dates and options are shown in the Scope section, because they are the same for all lots.

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## **Participation**

### **Legal and financial capacity conditions of participation**

**Lot 1. Housing Management System (HMS)**

**Lot 2. Property Management System (PMS)**



**Lot 3. Asset Management System (AMS)**

**Lot 4. Finance Management System (FMS)**

See Procurement Specific Questionnaire (PSQ)

### **Technical ability conditions of participation**

**Lot 1. Housing Management System (HMS)**

**Lot 2. Property Management System (PMS)**

**Lot 3. Asset Management System (AMS)**

**Lot 4. Finance Management System (FMS)**

See PSQ

### **Particular suitability**

**Lot 1. Housing Management System (HMS)**

**Lot 2. Property Management System (PMS)**

**Lot 3. Asset Management System (AMS)**

**Lot 4. Finance Management System (FMS)**

Small and medium-sized enterprises (SME)

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## **Submission**

### **Enquiry deadline**

3 November 2025, 5:00pm

## **Submission type**

Requests to participate

## **Deadline for requests to participate**

10 November 2025, 12:00pm

## **Submission address and any special instructions**

<https://www.sell2wales.gov.wales>

## **Tenders may be submitted electronically**

Yes

## **Languages that may be used for submission**

English

## **Suppliers to be invited to tender**

**Lot 1. Housing Management System (HMS)**

**Lot 2. Property Management System (PMS)**

**Lot 3. Asset Management System (AMS)**

**Lot 4. Finance Management System (FMS)**

Minimum 5 suppliers per lot

## **Award decision date (estimated)**

10 June 2026

## Award criteria

### Lot 1. Housing Management System (HMS)

Name	Description	Type	Weighting
Lot 1 HMS - Quality	Quality of the bid - details in the Instructions to Tenderers Part 1	Quality	85.00%
Lot 1 HMS - Price	Price of the bid - details in the Instructions to Tenderers Part 1	Price	15.00%

### Lot 2. Property Management System (PMS)

Name	Description	Type	Weighting
Lot 2 PMS - Quality	Quality of the bid - details in the Instructions to Tenderers Part 1	Quality	85.00%
Lot 2 PMS - Price	Price of the bid - details in the Instructions to Tenderers Part 1	Price	15.00%

### Lot 3. Asset Management System (AMS)

Name	Description	Type	Weighting
Lot 3 AMS - Quality	Quality of the bid - details in the Instructions to Tenderers Part 1	Quality	85.00%
Lot 3 AMS - Price	Price of the bid - details in the Instructions to Tenderers Part 1	Price	15.00%

### Lot 4. Finance Management System (FMS)

<b>Name</b>	<b>Description</b>	<b>Type</b>	<b>Weighting</b>
Lot 4 FMS - Quality	Quality of the bid - details in the Instructions to Tenderers Part 1	Quality	85.00%
Lot 4 FMS - Price	Price of the bid - details in the Instructions to Tenderers Part 1	Price	15.00%

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## Other information

### Payment terms

To be agreed as part of negotiation and contract

### Conflicts assessment prepared/revised

Yes

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## Procedure

### Procedure type

Competitive flexible procedure

### Competitive flexible procedure description

The procedure description and steps are contained in the Instructions to Tenderers (Part1 of the full documentation set)

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## Documents

### Associated tender documents

[https://www.sell2wales.gov.wales/Assets/NoticeBuilder\\_FileDownload.aspx?id=348782](https://www.sell2wales.gov.wales/Assets/NoticeBuilder_FileDownload.aspx?id=348782)

The instructions document sets out Cartrefi's Contracting requirements, general policy requirements, and the general tender conditions relating to this procurement process.

[https://www.sell2wales.gov.wales/Assets/NoticeBuilder\\_FileDownload.aspx?id=348895](https://www.sell2wales.gov.wales/Assets/NoticeBuilder_FileDownload.aspx?id=348895)

The Procurement Specific Questionnaire (PSQ) has been designed to help Cartrefi ensure that suppliers share the right information when participating in a procurement. This is separate from the formal tender submission (on how the supplier proposes to meet the tender requirements).

Please note: Do not complete or submit responses to Parts 2 - 4 at the PSQ stage of the process. Cartrefi will invite shortlisted suppliers to submit an Initial ITT at the appropriate time.

[https://www.sell2wales.gov.wales/Assets/NoticeBuilder\\_FileDownload.aspx?id=348874](https://www.sell2wales.gov.wales/Assets/NoticeBuilder_FileDownload.aspx?id=348874)

Lot 1 (HMS) specific documents Parts 2, 3 and 4

[https://www.sell2wales.gov.wales/Assets/NoticeBuilder\\_FileDownload.aspx?id=348875](https://www.sell2wales.gov.wales/Assets/NoticeBuilder_FileDownload.aspx?id=348875)

Lot 2 (PMS) specific documents Parts 2, 3 and 4

[https://www.sell2wales.gov.wales/Assets/NoticeBuilder\\_FileDownload.aspx?id=348876](https://www.sell2wales.gov.wales/Assets/NoticeBuilder_FileDownload.aspx?id=348876)

Lot 3 (AMS) specific documents Parts 2, 3 and 4

[https://www.sell2wales.gov.wales/Assets/NoticeBuilder\\_FileDownload.aspx?id=348877](https://www.sell2wales.gov.wales/Assets/NoticeBuilder_FileDownload.aspx?id=348877)

Lot 4 (FMS) specific documents Parts 2, 3 and 4

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## **Contracting authority**

### **Cartrefi Conwy Cyfyngedig**

- Public Procurement Organisation Number: PVDN-9226-PHMZ

Morfa Gele - Cae Eithin

Conwy

LL22 8LJ

United Kingdom

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Website: <https://www.cartreficonwy.org>

Region: UKL13 - Conwy and Denbighshire

Organisation type: Public undertaking (commercial organisation subject to public authority oversight)

Devolved regulations that apply: Wales