Specification of requirement
Home Energy Advice Tool (HEAT)
Date 31st July

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www.citizensadvice.org.uk

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1. Introduction

Citizens Advice Service in England and Wales

The Citizens Advice service provides free, confidential and impartial advice to help people resolve their problems. As the UK’s largest advice provider, the Citizens Advice service is equipped to deal with any issue, from anyone, spanning debt and employment to housing and immigration plus everything in between. We value diversity, promote equality and challenge discrimination.

The service aims:
• To provide the advice people need for the problems they face.
• To improve the policies and practices that affect people’s lives.

Citizens Advice Bureaux deliver advice services from over 3,500 community locations in England and Wales, run by 382 independent registered charities. Citizens Advice itself is also a registered charity, as well as being the membership organisation for these 382 member bureaux.

Citizens Advice represents the interests of consumers across essential, regulated markets. We use compelling evidence, expert analysis and strong argument to put consumer interests at the heart of policy-making and market behaviour.

2. Background

Citizens Advice recently agreed an energy advice strategy which sets out our plans for providing a consistent minimum standard of energy advice and information for our clients, irrespective of clients’ preferred channel for accessing advice. The objectives of the strategy are as follows:

For our clients
• To embed energy advice into our core advice framework and provide a consistent approach to energy advice and support offered across all channels
• To implement a seamless referral mechanism process (e.g. mid call transfer, email) for debt, consumer issues, welfare benefits, financial capability, e.g. Bureaux, consumer service and the Extra Help Unit (EHU) CAS.
• To implement a seamless referral route with other partners and other sector experts, taking into account the differences across England and Wales, e.g. energy efficiency advice and the installation of energy efficiency measures.

For the network
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- To equip the service with the tools and resources they need, making sure our current resources are joined together
- To work in partnership with the network to make the best use of skills and knowledge
- To support and facilitate learning around early intervention into the energy market, providing a suite of learning materials and tools to suit the chosen delivery method.
- To help strengthen local partnerships with other agencies and look for innovative and efficient ways of working.

For the service

- To create a set of clear and measurable quality standards which can be used to monitor the impact on the service and the effectiveness of our work

We plan to meet these objectives by equipping the Citizens Advice network with a variety of tools and resources, by training our advisers to an agreed level of expertise, by integrating our energy advice with our wider advice responsibilities and by developing and establishing referral routes with specialist advice providers.

We envisage our strategy will initially focus on the Energy Best Deal (EBD) service offered by many of our bureaux. The EBD service essentially consists of two elements: group sessions for advice workers and one-to-one advice sessions for clients (EBD extra). EBD advisers support clients on such matters as:

- Relief from fuel poverty
- Energy efficiency improvements
- Switching to lower cost tariffs
- Warm Home Discount

This project seeks proposals for the development of an energy advice tool, accompanying database and appropriate support for users. We envisage the tool will make an important contribution to implementation of the energy advice strategy.

3. Definition of the problem

Citizens Advice provides advice and self-help tools on a wide range of matters, particularly those relating to benefits, debt, housing and employment. We are rapidly improving our skill set with respect to energy and energy efficiency. We want to enhance our service by developing a new home energy advice tool (HEAT) for use by both our advice workers and as a self-help tool for clients. We want the tool to integrate with an appropriate database for capturing information and provide
monitoring data and to work alongside our customer relationship management system, PETRA.

4. Why research is necessary

Citizens Advice is both expanding and re-designing its Energy Best Deal (EBD) advice service. We recently appointed 10 energy champions within individual bureau who are currently working with the Citizens Advice Service Design team to re-design the EBD service. We anticipate the new service will offer a wider range of advice and result in improved outcomes for clients. Champions will also help cascade the new service through EBD bureau. The champions are trained to Level 3 Energy Awareness.

We have also received funding for five EBD bureau in Wales to specifically focus on improving the take up of energy efficiency measures (although we aim to improve take-up throughout the network). Advisers in these bureau will visit some clients in their homes. This should improve the quality of energy efficiency advice offered considerably since the advisers are more likely to capture accurate information about home insulation standards and heating systems than clients, e.g. type and age of boiler, wall type, presence of cavity wall insulation.

We are about to start a number of EBD pilots as part of the re-design project. The development of a new tool to improve our energy advice service is therefore particularly timely. For example, the five Welsh bureau could help pilot and provide feedback on the tool and its ease of use.

5. Research objectives

The project aims to develop a tool, accompanying database and appropriate support for providing energy advice to our clients and as a self-help facility by more confident clients. The objectives of the project are as follows:

- To develop an easy to use Home Energy Advice Tool (HEAT) that delivers the following functions:
  - information on low cost and no cost energy efficiency measures
  - tailored advice on grants, other support and eligibility for energy efficiency and micro-generation schemes
  - tailored advice on eligibility and claiming the Warm Home Discount
  - tailored advice on switching tariffs and fuel company
  - information on specific energy topics, e.g. heating controls, understanding energy bills, energy efficiency and microgeneration technologies, damp and condensation, tariffs etc
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- To develop an easy to use database that delivers the following functions:
  - capture ‘before and after advice’ information
  - monitor advice outcomes
  - a facility for pre-loading existing information into the database
  - easy transfer of information to and from the PETRA database
  - provide an indication of home energy rating and client fuel poverty risk
- To provide a facility for capturing client information ‘in the field’, e.g. home visits
- To provide training and support on use of the tool and database
- To help advice workers identify clients who may need more specialist energy advice and can easily refer clients for such services, e.g. EHU, specialist energy efficiency advice, Energy Performance Certificate rating.
- To help advice workers identify clients who may need other forms of advice, for example on benefits, debt or housing

We do not envisage the tool will provide a full RdSAP or EPC for clients, nor an accurate assessment of fuel poverty status (on either the Low Income High Costs or the 10 per cent definitions). However, we would welcome suggestions as to potential proxies for energy efficiency standards and fuel poverty status that the tool may be able to capture.

6. Uses of information

This project is primarily intended to provide an advice tool and database for EBD bureau and potentially, in the longer term, the whole Citizens Advice service. We also want to generate reports from the database for both internal (to Citizens Advice and individual bureau) and external use, for example on advice outcomes, effectiveness, value for money and overall impact of the energy advice service.

Citizens Advice is also likely to use the database for a wide range of other purposes, including research and campaigns, advocacy on energy issues (e.g. adequacy of energy efficiency programmes or Warm Home Discount), monitoring of service impact and provision of feedback to EBD funders. Similarly, we envisage clients using the self-help facility will as a result better understand and control their energy use, for example by installing energy efficiency measures in their homes.
7. **Target population**

The initial target population are EBD clients in England and Wales. In the long term we envisage all bureau will offer a minimum standard of quality energy advice across all channels within which HEAT will form an important element.

8. **Anticipated approach**

We anticipate suppliers may already have tools and databases that can easily be adapted for use by the Citizens Advice service. Key criteria with respect to meeting our requirements are:

- Value for money
- Ease of use by both advisers and clients
- Range of topics covered
- Accessibility
- Accuracy
- Suitability for clients in vulnerable situations
- Support and training offered to users
- Off line usability
- Ease of database interrogation and production of reports on advice outcomes

We envisage the project will involve a development stage in which the supplier works with us in adapting their tool and database to meet the requirements above.

9. **Analysis required**

We do not envisage this project will require the supplier to carry out specific analyses, other than tests and demonstrations of outcome reports that can be generated from the database. However, we would like the supplier to describe in their bids the type of analysis that Citizens Advice staff may be able to carry out with the database.

10. **Deliverables**

We envisage the project will provide the following deliverables:

- A energy advice tool for use by advisers in the field and in bureau, coupled with an on-line facility that more confident clients can use
A database for storing ‘before and after advice’ data and which is capable of responding to a wide range of interrogation queries, allows easy import of existing data.

A user guide

Training and support on use of the tool and database

11. Performance and quality requirements

Citizens Advice will require regular meetings, including a project initiation meeting, to be held between the supplier and ourselves to ensure progress is on track and any difficulties are resolved promptly. Any anticipated shortfall in quality or similar failing shall be brought to the attention of Citizens Advice immediately.

We advise suppliers to show how they adhere to the appropriate professional code of conduct, the quality systems they have in place and the systems they propose to use for ensuring data security.

The supplier should consider the wide range of equalities issues, including public duties, and ensure that these are all given due consideration at all stages of the research process.

12. Evaluation criteria

Citizens Advice will make its selection on the basis of that proposal which represents the best value for money. The following criteria will apply:

<table>
<thead>
<tr>
<th>Evaluation criterion</th>
<th>Description</th>
<th>Weighting</th>
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</table>
| Technical experience | Evidence of providing similar services to other organisations and particular skills/experience relevant to the problem  
Also includes your performance on previous projects for Consumer Futures and its predecessor bodies and for Citizens Advice | 15%       |
| Approach             | Details and suitability of                                                                                                           | 10%       |
## Specification of Requirement

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Score</th>
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</thead>
<tbody>
<tr>
<td>Understanding our business needs</td>
<td>Indication of a clear understanding of the problem and the research objectives</td>
<td>15%</td>
</tr>
<tr>
<td>Staffing / Resources</td>
<td>Details of any proposed staff or sub-contractors to be used for the provision of the services</td>
<td>10%</td>
</tr>
<tr>
<td>Implementation plan</td>
<td>Details of your implementation plan to meet the timescales</td>
<td>10%</td>
</tr>
<tr>
<td>Quality</td>
<td>Details of how you ensure that a high quality service is maintained throughout the contract period</td>
<td>10%</td>
</tr>
<tr>
<td>Price</td>
<td>A full breakdown of all costs should be given</td>
<td>30%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>100%</td>
</tr>
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Tenders are evaluated by scoring against each of the above criteria using a 0-10 scale, where 0=Clearly fails to meet the requirement and 10=Excellent standard with no reservation at all about acceptability. The supplier with the highest overall score will be awarded the contract.

Please note that on completion of all contracts, suppliers are evaluated against these same criteria based on their performance. This post-project feedback will be considered in future tendering processes.

### 13. Form of Proposal

All clarification questions must be made in writing and sent by email to Sue Russell no later than 5pm on **Friday 14th August**. A response to all clarification questions shall be issued to suppliers by **Friday 21st August**.
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Tenders must be sent to the project lead sue.russell@citizensadvice.org.uk 5pm on Friday 4th September.

Bidders should complete tenders in the format indicated below. All questions must be answered in full.

Company overview and previous experience

- Please provide a brief overview of your organisation. This must include a brief history and include detail of your capability and capacity.
- Please provide detail of your understanding of the requirement and evidence your skills and experience for carrying out the services.
- Please detail two case studies that evidence your ability to deliver the services required. This must include details of the brief, how you delivered the project, and the objectives that were achieved.
- Please provide the names, addresses, and contact details of two referees that could be contacted to provide a reference of your ability to deliver the services.
- Please declare if there is a conflict of interest in carrying out this work

Key personnel

- Please provide a copy of your organisation chart.
- Please provide details of the personnel who shall be responsible for the delivery of the services. This must include a CV for these individuals that highlight their relevant skills and experience.

Methodology and delivery of the services

- Please provide a detailed methodology of how you propose to deliver the services and objectives detailed in the *ITT/ITQ. This methodology must describe the project from end-to-end; from finalising the conception to delivery of the final report.
- Please provide a detailed project plan for the delivery of the proposed methodology. This must clearly define who shall carry out the tasks in the plan and the number of days for completion.

Commercial offer

- Prices shall be quoted in pounds sterling unless otherwise stated and presented separately from the rest of the *tender/quote in the separate pricing schedule provided by Citizens Advice. VAT, where applicable, should be shown separately as a strictly net extra charge. Please detail any other costs associated with the provision of the services under this agreement. Any costs not detailed will be deemed to have been waived.
- Attached as part of the tender documents are the Citizens Advice Terms & Conditions of contract. Please confirm you acceptance to the 
terms. Bidders should note that failure to accept the Citizens Advice Terms & Conditions of contract will result in their elimination from the tender process following initial evaluation.

**14. Procurement timetable**

Citizens Advice will work towards the following procurement timetable:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
</tr>
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<tbody>
<tr>
<td>Issue Invitation to Tender</td>
<td>Friday 31st July 2015</td>
</tr>
<tr>
<td>Closing date for clarifications questions</td>
<td>Friday 14th August</td>
</tr>
<tr>
<td>Date for responses to clarification questions</td>
<td>Friday 21st August</td>
</tr>
<tr>
<td>Tenders received</td>
<td>Friday 4th September</td>
</tr>
<tr>
<td>Evaluation of tenders</td>
<td>Monday 7th September – Monday 14th September</td>
</tr>
<tr>
<td>Contract awarded</td>
<td>TBC</td>
</tr>
<tr>
<td>Contract commences</td>
<td>TBC</td>
</tr>
<tr>
<td>Development stage starts</td>
<td>one month</td>
</tr>
<tr>
<td>Pilot of HEAT and database starts</td>
<td>October</td>
</tr>
<tr>
<td>Final version of HEAT and database installed</td>
<td>Tuesday 1 December 2015</td>
</tr>
<tr>
<td>Training and on-going support</td>
<td>October TBC</td>
</tr>
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</table>