

**GOSPORT BOROUGH COUNCIL**

**HOUSING DEVELOPMENT CONSULTANTS**

**APPENDIX 2 - CASE STUDY REFERENCE QUESTIONNAIRE**

PLEASE RETURN YOUR RESPONSE BY: **Thursday 13th May 2021 at 12:00noon**

Email: purchasingandprocurement@gosport.gov.uk

Thank you for taking the time to complete and return this questionnaire.

Please be aware that if we do not receive a returned questionnaire this may result in 0 points being awarded for the bidder's reference case study which is a pass/fail minimum requirement for this procurement project. If you require an extension of time to complete the questionnaire please inform the Supplier seeking the reference and the Council using the email address above.

**SECTION 1 - CONTRACT CASE STUDY OVERVIEW**

***To be completed by supplier expressing interest in the Authority's tender before forwarding the questionnaire to the Client referee***

1. **Name of Lead Consultant / Lead Designer**
2. **Title of Project**
3. **Client -** Company name, Name of contact, Position in organisation, Company address, Email, Telephone number
4. **Location -** Site name, address, city
5. **Contract Dates -** Start and end dates e.g. May 2017 – May 2018
	* Consultant
	* Contractor
6. **Contract Value -** eg. £ X Million
	* Consultant
	* Contractor
7. **Consultant Team -** Provide details of your key delivery team, providing for each member:
	* Name
	* Position
	* Contract Responsibilities / Services
8. **Description of the Project**
* Provide a general overview of the project

**SECTION 2 - REFERENCE QUESTIONNAIRE**

***To be completed by the Client referee and forwarded directly to the Council via the email address stated***

**Client Referee Details**

|  |  |
| --- | --- |
| **Contract/Project Name** |  |
| **Company Name** |  |
| **Name of Referee** |  |
| **Position in Company** |  |
| **Telephone Number** |  |
| **Email** |  |

|  |  |  |
| --- | --- | --- |
| **Representation of Services** | **Yes** | **No** |
| Please confirm that the description of the project, dates and values provided in the Contract Case Study Overview is an accurate representation of the services and works undertaken for your organisation in respect of the discreet package of services and works covered under the contract stated. |  |  |
| Please provide any further comments as required (expand box as needed): |

Please rate the service performance of the bidder in each of the areas set out in the table below. Tick (or type Y) in the relevant box for the performance areas set out below using the following criteria:

|  |  |
| --- | --- |
| **Judgement** | **Performance** |
| Excellent | The bidder exceeded the service levels expected. |
| Good | The bidder met the service levels expected to a high standard.  |
| Satisfactory | Overall the bidder met the service levels expected. |
| Unsatisfactory | The bidder failed to meet expected service levels to the extent that terms of the contract / specification / offer were breached in full or in part  |
| NA | Not applicable to the contract / project delivered |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Performance****Element** | **Excellent** | **Good** | **Satisfactory** | **Unsatisfactory** | **NA** |
| 1. Delivery to agreed cost (consultant team fee)
 |  |  |  |  |  |
| 1. Delivery to agreed programme (consultants)
 |  |  |  |  |  |
| 1. Quality of Design
 |  |  |  |  |  |
| 1. Design of scheme within client budget
 |  |  |  |  |  |
| 1. Management of sub-consultants
 |  |  |  |  |  |
| 1. Continuity of consultant team personnel
 |  |  |  |  |  |
| 1. Management and mitigation of project risk
 |  |  |  |  |  |
| 1. Quality of stakeholder engagement
 |  |  |  |  |  |
| 1. Level of added value brought to the project (if applicable please provide details in comment box below)
 |  |  |  |  |  |
| 1. Management of contractor
 |  |  |  |  |  |
| 1. Approach to partnership working - Client, Sub-Consultants / Supply Chain, stakeholders, approving bodies
 |  |  |  |  |  |

Please provide any comments you may have regarding the performance of the Consultant below (expand box as needed) that support any ratings you have provided above or that relate to any additional elements not listed above.

|  |
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Further to the performance elements tested above please provide information if any of the following issues have applied to the contract / project using the box (expand as needed) below:

* Details of any legal / financial penalties applied
* Details of any issues - with Consultant, with Sub-Consultants / Supply Chain, 3rd party approving bodies, etc. and how these were resolved
* Details of any major variations to the contract and how these were resolved operationally and financially

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In addition to the reference questionnaire above we would be keen to understand any client learning or feedback post completion of works. Whilst this does not form an assessed part of the reference it would be appreciated if any key learning points would be shared.

This may include items such as;

* whether the final project fully met with the original client objectives
* how the buildings perform in use
* have there been any maintenance issues
* was there any learning regarding procurement route / contract choice
* is there any resident / end user feedback
* would you change anything if doing the project again