

Aster Group Energy Brokerage Specification

Invitation to submit a proposal to provide an energy (gas and electricity) brokerage service for a period of 36 months, with an option to extend for a further 24 months in 12-month increments (3+1+1), covering Aster Group's domestic communal and commercial property portfolio (known as Aster Property, Synergy Housing, Aster Communities and PFI, based primarily in the south west of England (Hampshire, Wiltshire, Dorset, Somerset, Devon and Cornwall)).

In total there are just over 1,200 electricity supplies, accounting for approximately 6,600 MWh of consumption per annum. Of these supplies, 22 have half-hourly meters and 43 are unmetered. In addition, there are 113 gas supplies, with a total annual consumption of around 14,800 MWh.

Bidders are required to set out how they would deliver the following requirements, completing the boxes below each section and adhering to the word limits stated.

Core requirements

1. Energy procurement compliant with Public Contracts Regulations

The broker is required to:

- based on the client's portfolio and stated requirements, which will include competitive pricing and the ability to pay by direct debit, approach relevant licensed UK utility providers to tender to supply Aster's estate. Consumption data, where available, for each gas and electricity supply is required to be compiled by the broker in a format suitable for potential utility providers to quote accurately;
- provide tender illustration summaries to include: full supply address, MPRN / MPAN, current / tendered standing charges and kWh unit prices;
- shortlist those tenders which are best able to meet the client's requirements, and provide energy market advice relevant to tender submissions to assist the client in selecting the winning tender;
- review all contractual documents prior to signature to ensure that the terms and conditions are in the best interest of the client;
- upon instruction from the client, communicate the offer acceptance to the relevant utility provider(s), confirming terms and conditions;
- liaise directly with the client and the utility provider(s) to ensure implementation of new supply contracts from the agreed date;
- provide to the client a post-tender report confirming full details of the accepted offer;
- conduct an annual review of the service and share the outcome with the client.

The available energy suppliers relevant to the proposal, together with a summary of their offerings including renewable energy tariff options, should be detailed in your response.

2. Invoice validation and processing

The broker will ensure that the utility provider(s)' invoices are paid via direct debit and will set up the required process with the client.

The broker will also ensure that invoices are sent directly to them for validation and processing. Invoices will be required to be processed within five (5) working days of receipt.

As a minimum, the broker will perform the following validation checks:

- invoice relates to a supply belonging to the client;
- invoice covers a period of ownership of the supply by the client;
- invoice is mathematically correct;
- billed energy usage is correct, based either on meter readings or estimates based on period-on-period analysis;
- correct contracted rates, levy reductions / exemptions, discounts have been applied; and,
- repeat billing is correct.

Where the validation check indicates an issue, the broker will raise this with the utility provider directly and ensure that it is rectified and billing adjusted as required.

The broker will send the following to the client:

- Prior to the payment due date, a standard payment journal containing invoices authorised to pay. Payment journals are not to exceed more than one per working week and will contain high-level invoice detail only; and,
- A monthly report containing details of all queries and their status.

The broker will also make these reports available to the client via a web portal.

3. Account management and reporting

The broker is required to carry out the following:

- using information provided by the client, create and maintain a database of energy supplies that are present or have been in the past the responsibility of the client. The database is to contain as a minimum, but not limited to, the following: supply address, meter references (MPAN or MPRN, serial number), the supplier and their unique reference, any client references, processed invoices in-line detail, present supply status;
- manage changes of tenancy;
- arrange for additional supplies to be registered, as required;
- claim credits owed;
- manage supplier queries;
- work with the client to resolve disputes with suppliers;
- make available to the client a reporting facility covering, as a minimum: accruals; historic consumption, cost and carbon emissions; and, projected consumption & cost;

- arrange quarterly account meetings with the client to review contract performance; and,
- provide to the client utility market information on a minimum quarterly basis.

4. Billing audit

The broker will conduct a billing audit of the supplies they manage in order to identify opportunities for refunds or on-going savings, covering the last six years. Any such opportunities will be communicated to the client in a report showing all credits, refunds, invoice amendments and savings identified and setting out any further actions required to claim them.

With the permission of the client, the broker will approach utility provider(s) or third parties on their behalf in order to reclaim any overcharges and realise on-going savings. The broker will ensure that the client receives regular updates on the status of submitted queries.

The audit process will be repeated at least annually to capture any changes to the portfolio that have taken place since the previous audit.

Potential Additional services

5. Individual dwelling void management

Please outline what is included, for example any debt write-off or access to pre-paid cards

6. End-to-end billing and payment service for our tenants with heat meters or electricity / gas sub-meters

7. Water bill validation & processing, and assistance with account termination

8. Other services such as meter audits and smart meter provision, together with any activities which will generate social value and support our wider fuel poverty and energy efficiency aspirations.