Invitation to Tender Document

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| --- | --- |
| Description | Windows and doors programme for 2024/2025 |
| Issue Date | 24th June 2024 |
| Clarification Questions Closing Date | 1st July 2024 |
| Submission Deadline | 8th July 2024 – 5pm |

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# Introduction

North Star is a North East based Housing Association and our purpose is to provide affordable housing, invest in our communities and develop new homes across the Tees Valley, North Yorkshire and County Durham.

Here at North Star, we care about the people and the communities that we serve.   We work, in collaboration with others, to create stable, secure, trusting and supportive environments where people feel they belong.

**Our Core Values are:**

**Creative**

We create environments to enable people, places and communities to thrive. We believe many things are possible and that our energy brings about exciting change.

**Connected**

We are connected to the world we live in. Therefore, we are relevant, informed and knowledgeable. We develop strong relationships that are based on integrity and trust.

**Courageous**

We challenge ourselves and others. We experiment; pioneer and we dare to be different.

We build homes, but more importantly we create futures, and we develop our communities from the inside out. We work together to build on community strengths and to really help make a difference to people’s lives. This can be seen in the vast, varied and valuable community investment and tenant involvement work we coordinate. We deliver a wide range of initiatives, ranging from school breakfast clubs, reading groups and homework clubs, to creating community gardens and green spaces, providing work placement opportunities and supporting local foodbanks.

At North Star, we place people at the forefront of everything we do. Our vision, our values and our organisational strategy are all centred on creating and sustaining great places for people to live and work in. We strive to make a difference and our culture is what sets us apart from the rest. We hear, we listen and most importantly we act, we embrace challenge and change, continually striving to improve and enhance the lives of our staff and our tenants.

We’re also a PlaceShaper, a national network of more than 100 community-focused housing associations. Together we own and manage more than 805,000 homes and provide services to more than two million people. We re-invest 100% of our profits into our homes and communities and have helped more than 60,000 people into work since 2010.

## Tender Brief

North Star is looking to procure a supplier of Window and doors, which will include liaising with customer and client, surveying properties to plan the replacements of these components within agreed timescales adopting all H&S requirements along with relevant sign off paperwork and guarantees after install.

Additional information is provided add list of appendices.

It is estimated that the contract value is likely to be around £240K per annum with an overall contract value of approximately £550K over the full term of this contract including any extensions.

## Supporting Documents

North Star is able to provide the following supporting documentation in order to assist you in pricing your bid.

* 0050 - Brief/Scope of works
* 0050 – Windows & Doors Pricing Schedule

## Contract Term

The contract is being offered with a minimum term of 2 years with the option to extend a further 3 years on an annual basis.

## Transfer of Undertakings

TUPE does not apply to this tender (below for reference only).

The Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE) is likely to apply in this instance. At present we do not have a comprehensive list of employee details, but this will be provided by our incumbent supplier at least 28 days prior to the commencement of any new contract. Please note TUPE is only likely to apply to bidders that are submitting for Lot 1 of an ITT. Bidders must ensure that obligations under the TUPE regulations are accounted for when preparing their bid.

Bidders must also be aware that all employees assigned to provide services as part of any contract to North Star adhere to Code of Conduct guidelines (see **Appendix F**). It will be the responsibility of any winning bidder to ensure that these are upheld and in instances where they are not, to follow a robust disciplinary process and where necessary have them removed from the contract.

## Collusion

North Star will not accept any collusion between supply partners and as such require a declaration from any participating bidder confirming their acceptance of this policy (see **Appendix A**). If it is found that any collusion has taken place between supply partners(s) this will be treated as fraudulent and the colluding supply partner(s) response(s) will be rejected.

## Communications

During the time periods specified on the front of this document all communications regarding this exercise must be sent via North Star’s e-procurement portal (Contracts Finder) in the event that this is not accessible for whatever reason, communications can be sent via email to [Catherine.Sewell@northstarhg.co.uk](mailto:Kerry.hunter@northstarhg.co.uk) . Under no circumstances should any of the evaluation team be contacted directly.

## Living Wage

North Star is an accredited organisation with the Living Wage foundation and as such we must ensure that all of our regular contracted staff and sub-contractors are paid the ‘living wage’. The Living Wage is currently £12.00 per hour across the UK and £13.15 for London. Further details regarding the Living Wage can be found at www. <https://www.livingwage.org.uk/>. As part of this tender, we require bidders to complete the Living Wage declaration in **Appendix B** in instances where they are a living wage supplier or where they can commit to paying contractors and sub-contractors working on this contract in line with these rates. Winning bidders will be required to complete this declaration annually and commit to any changes in these rates for the life span of any contract.

## Social Value

North Star is committed to increasing the level of Social Value our contracts bring to the local area and communities. As such, we try to include this when making any decisions around new contractors and suppliers. As part of this process the successful bidder is asked to make commitments to maximise the social value of their contract by contributing time, money, expertise or a combination to North Star’s Community Investment Strategy.

To establish the impact of social value, North Star have developed some Social Value Guidance (**Appendix C)** outlining areas in which bidders can make an impact**,** along with our Social Value Calculator (**Appendix D)**. All bidders will be required to read through this guidance and complete the Social Value Calculator as part of this ITT. Non-compliance will not disqualify any bidder in this process, but North Star reserve the right to favour bidders who make commitments in this area.

# Procurement Timetable

|  |  |
| --- | --- |
| ITT Issued | 24/06/2024 |
| Deadline for ITT clarification questions | 01/07/2024 |
| Deadline for ITT submission | 08/07/2024 |
| Evaluation completed | 15/07/2024 |
| Award of contract | 17/07/2024 ND on AL 15-19th July back 22nd So say by 25th |
| Commencement of services | TBC |

## Submission Criteria

All bidders are required to complete all sections of this ITT and return all documents as outlined in the Submission Checklist in **Appendix E**.

When submitting your final responses please ensure that you return the documents in the original format provided and with the original layout. Additional company information or introduction is permitted but this must be submitted separately and will not be scored or taken into account for the purpose of this exercise. E.g. If the pricing document alongside this ITT is in Excel, then it must be returned in Excel. In the case where a document requires a signature it is permitted to return the document in pdf format.

As per the communications section all submissions must be returned via our e-procurement portal where possible and it is the responsibility of the bidder to ensure that any bid documentation is received.

Please note tender documentation will not be accessible after the deadline has passed so it is the responsibility of the bidder to ensure that they submit their tender in advance and report any issues immediately to the Procurement Lead.

## Evaluation Criteria

All bid submissions will be evaluated as per the below matrix.

|  |  |
| --- | --- |
| Criteria | Weighting |
| Quality | 75% |
| Price | 15% |
| Social Value | 5% |
| Living Wage | 5% |

## Evaluation Team

The evaluation team will consist of North Star employees independently. For clarity the e-procurement system automates all final scoring once all of the evaluation team have submitted their final scores.

ITT responses will be evaluated on the basis of information submitted by the deadline. Where information or documentation submitted appears to be incomplete or erroneous or specific documents are missing, North Star reserves the right to request the bidder to clarify the information or documentation although North Star is under no obligation to do so.

# 3 Instructions to bidders

## 3.1 Completion of ITT

Bidders are required to answer all questions and complete all relevant sections unless otherwise stated.

Failure to answer questions or relevant sections may result in disqualification.

The ITT response must be clear, concise and complete. Bidders may be marked down or excluded from the procurement if their ITT responses are ambiguous or lack clarity.

Bidders should submit only such information as is necessary to respond effectively to this ITT. Unless specifically requested, do not include extraneous presentation materials.

Bidders must respond to each question in full. Each question will only be marked on the basis of the information provided for it and statements in other questions and cross-referenced information will not be taken into account. North Star is under no obligation to “follow up” with a bidder to obtain any missing information. As such where your answer cross refers to a document and/ or embedded item you are advised to complete the response in full and/ or copy the relevant paragraphs from other documents into your response.

## Clarification Process

As part of this ITT bidders are given an opportunity to ask any questions where information is omitted or unclear within this tender pack, known as the clarification process. Any questions must be submitted via the e-procurement portal before the deadline outlined within the Procurement Timetable. North Star will where possible respond to all clarification questions within 4 working days or within 2 working days of this deadline.

North Star reserves the right to decline to answer any questions that do not relate to the tender directly.

## 3.3 General Information

The minimum requirements assessed at each section need to be maintained throughout the tender process. If these minimum requirements are not maintained, you will be dismissed from the process.

North Star may seek independent financial and market advice to validate information declared or to assist in the evaluation. For transparency North Star utilises the services of Dun & Bradstreet to establish financial status of a bidding entity.

Where clarification, new and/ or external information proves that statements made, or information supplied by the bidder is or was false and/ or inaccurate scores for any concluded sections of the evaluation process may be reduced and/ or downgraded. Where this clarification has resulted in the bidder not passing the minimum or expected criteria as set out at selection stage then that bidder may be eliminated from the process.

## 3.4 Standard Selection Questionnaire

This needs to be completed fully by all parties and Bidders are required to “PASS” all questions in order for their bid to be accepted and evaluated by our evaluation panel.

Full guidance can be found in the footnotes of each question regarding the criteria that is required to “Pass” each section. Where a bidder does not meet these requirements, their bid will be rejected and not evaluated further.

North Star do however reserve to right to use their discretion where evidence has been provided in instances where current and historical data may differ or where there is an acceptable reason why the minimum criteria hasn’t been met.

Where bidders have not met our requirements in this section, they will be notified immediately along with the section that they failed to meet. No further feedback can be given in relation to their tender bid.

Where time is permitted, North Star will endeavour to release tenders using a two-stage process, Stage 1 being the Standard Selection Questionnaire, Stage 2 the formal ITT process. Where time is restricted both stages will be combined, for clarity this will be outlined within the Procurement Timetable.

# Scoring the ITT

All bidders who successfully pass the Standard Selection Questionnaire will be evaluated in the following areas.

## Quality Questions

In order to evaluate Quality bidders will be required to complete the Evaluation questions fully and where requested provide backing information. Evaluators will then score your responses using the following matrix.

|  |  |  |
| --- | --- | --- |
| Score | Standard | Criteria |
| 10 | Excellent | Excellent response to the requirements with detailed evidence that is clear & complete. |
| 8 | Good | Good response to the requirements with evidence that is clear. |
| 6 | Satisfactory | Satisfactory response to the requirements which provide adequate evidence. |
| 4 | Fair | Information submitted is limited with insufficient supporting documentation. |
| 2 | Poor | The information submitted is limited without any supporting documentation. |
| 0 | Unacceptable | Unanswered question or failed to adequately address even the basic requirements. |

Bidders will be required to score a minimum of 6 points against each question to meet the minimum criteria for this tender. Scores below this mark will be disqualified.

Quality will account for a percentage of your overall score as outlined in the Evaluation Criteria.

## Price

Please refer to the Pricing Document for full details of what is required to complete your pricing submission. Details will also be provided in instances where rate cards are requested to how bids will be evaluated.

Bidders will receive a score based on their ranking position, Rank1 being the lowest bid and receiving the maximum score.

For example, if 10 bids are received

Rank 1 – 10 Points

Rank 2 – 9 points

Rank 3 - 8 Points

…Rank 10 – 1 Point

For clarity points will be turned into a percentage of your overall core as outlined in the Evaluation Criteria.

Incomplete pricing schedules cannot be evaluated, and bidders will be disqualified from the process.

## Social Value

All bidders will be required to complete the Social Value Calculator as per **Appendix D** and return this with their submission. Social value will be scored as per the below table with the maximum score of 10 being awarded.

|  |  |
| --- | --- |
| Contractor makes no social value commitments | 0 Points |
| Contractor makes commitments below baseline percentage expectations | 4 Points |
| Contractor makes commitments equal to baseline percentage expectations | 6 Points |
| Contractor makes commitments 1-9% greater than baseline percentage expectation figure | 8 Points |
| Contractor makes commitments 10%+ greater than baseline percentage expectation figure | 10 Points |

For clarity points will be turned into a percentage of your overall core as outlined in the Evaluation Criteria.

# Debriefing

To comply with the Public Contracts regulations 2015, North Star will provide written confirmation to all bidders the outcome of this ITT within 10 days from the tender submission deadline.

Further feedback will be given to unsuccessful bidders outlining the winning score, the winning bidder, their own scores and in the case of disqualification the reason why they didn’t meet the minimum criteria.

# North Star Disclaimer

No information contained within this ITT, or in any future or past communication made between North Star and any bidder in connection with this ITT, shall be relied upon.

All responses will be treated on their own merits as solutions to the areas of requirements that they address. For the avoidance of doubt, North Star is under no obligation to contract all or any portion of the requested services defined herein.

Only the execution of a written agreement signed by both the successful bidder and North Star will obligate North Star in accordance with our Terms and Conditions (available upon request)**.**

Bidders’ responses to this ITT shall be binding for a minimum period of ninety (90) days.

While every effort had been made to ensure the accuracy of this ITT, North

Star does not accept any liability for any errors contained herein - factual or otherwise. It is the responsibility of the bidder to ensure that they have read and understood all the documentation included within this ITT. Any identified omissions or discrepancies should be reported as soon as possible to North Star.

# Right to Cancel

North Star reserves the right, without prior notice and in its absolute discretion, to withdraw this ITT at any time or re-invite tenders in the same or any other terms change or terminate the tendering procedure for this requirement at any time before the signing of any contract and the right not to award a Lot or any contract and is not bound to accept the lowest price or any tender response. North Star also reserves the right to seek clarifications on information supplied by bidders, to waive or change the requirements of the ITT without prior notice and to make changes to the timetable structure or content of the process.

# Publicity

Bidders shall not undertake (or permit to be undertaken) at any time, whether at this stage or after conclusion of the contract, any publicity activity with any section of the media in relation to the contract other than with the prior written consent of North Star (in relation to the form and content of the proposed publicity).

# Copyright

The copyright in this ITT is vested in North Star and may not be reproduced, copied or stored in any medium without the prior written consent of North Star. This ITT and any document issued to bidders supplemental to it shall remain the property of North Star and shall be returned upon demand.

# Confidentiality

Bidders shall treat all information and documents issued by North Star and its advisors as private and confidential and their express written consent must be obtained prior to the release of information or documents to any third party other than a bidder's funders, advisers or proposed sub-contractors. This ITT is made available upon the condition that it is only used in connection with this tender competition.

Unsuccessful ITT responses received will be held for a minimum of 6 months.

Bidders must highlight within their ITT response any potential conflict of interests. Any interests not declared may lead to the bidder’s elimination from the process.