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Invitation to Tender for

Procurement Advice and Support

Contract Reference T109/2025

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1. **Background and Information Relating to the Contract**
   1. **Overview of the Pioneer Group**

**About us**

The Pioneer Group (Pioneer) are a small housing association that manage 2,500 homes predominantly in Castle Vale, Birmingham.  We are focused on providing great safe homes and making lives and communities better.

As an anchor organisation, we use our Group strength to help build resilient communities where people can thrive.

Later this year we will be celebrating 20 years since The Housing Action Trust transferred homes on the vale to what was then called Castle Vale Community Housing Trust. This was then known as Castle Vale Community Housing Association and later renamed Pioneer Group in 2015.

Today we continue to deliver on our promise to the Housing Action Trust, reinvesting in homes and communities and taking steps to reduce their impact on the environment.

The group structure includes our two subsidiaries, Compass Support, a charity providing a range of services for our residents and the wider community and Castle Vale Stadium.

**Our Values:**

* Community - Consistently do our best for our residents and communities, listening to what matters and acting on their feedback.
* Respect - Take responsibility for and embrace and celebrate diversity.
* Empower - Invest in our colleagues and our people to be the very best they can be.
* Together - We're inclusive, we work together to make the most of our resources, and to make a positive impact.

**We are passionate about:**

* Enabling people to reach their true potential by giving them access to youth, family, health and employment support services.
* Providing community-driven housing solutions to meet the needs and aspirations of local people and the communities they live in.
* Creating successful communities through capacity building and developing partnerships between local people and local agencies, as well as the wider voluntary, public and private sectors.

You can read more about us [**here**](https://www.pioneergroup.org.uk/)

* 1. **Overview of the Contract**

The scope of the Contract is the provision of specialist support and advice relating to procurement activities across the association in relation to but not limited to:

* Property Maintenance Activities
* Procurement of goods and services
* Procurement of specialist IT Services such as Disaster Recovery
* Major utilities including gas and electricity
* Legal Services
* Insurance support/consultants

The key requirements of the Contract are as follows:

* Maintaining statutory compliance
* Ensuring Procurement activities are complaint
* Achieving value for money
* Achieving high levels of contract performance

The table below illustrates the indicative procurement requirements of the association over the initial 24 months of this contract. This list is not exhaustive.



A single Contractor is required to deliver the entire scope of the Contract.

* 1. **Purpose of the Invitation to Tender**

This ITT provides the details of a competition being conducted by the Pioneer Group to select a Successful Bidder for the Contract.

* 1. **Contact information**

All communication in respect of the bid process shall be submitted via the Pioneer Group to the [governanceassuranceteam@pioneergroup.org.uk](mailto:governanceassuranceteam@pioneergroup.org.uk) Bidders are reminded that the Pioneer Group will not issue or respond to communications via any other means.

* 1. **Duration of the Contract**

It is envisaged that the Contract with the Successful Bidder shall last for an initial period of 3 years, with an option to extend at the Pioneer Group’s sole discretion for up to 2 further years, plus a further 2 years giving a total potential period of 7 years.

The estimated Contract commencement date is May 2025.

* 1. **Specification**

Appendix 1 contains a description of the Services to be provided by the Successful Bidder under the Contract. The Successful Bidder shall be required to comply with the Specification in providing the Services.

* 1. **Pricing**

As part of their bid submission Bidders must complete and return the Pricing Document set out at Appendix 3 of this ITT. The completed Pricing Document shall be taken into account by the Pioneer Group in evaluating Bidders’ bids.

If a Bidder is successful in bidding for the Contract, then the Pricing Document it submitted shall be referenced in the Contract entered into with the Pioneer Group and shall be used in calculating the amount payable to the Successful Bidder under the Contract.

* 1. **Conditions of Contract**

The Conditions of Contract that the Pioneer Group proposes to enter into with the Successful Bidder is set out at Appendix 6 of this ITT.

* 1. **TUPE**

Bidders are asked to submit their bid for the Contract on the following basis:

1. Bidders are advised that it is the Pioneer Group’s view that the Transfer of Undertakings (Protection of Employment) Regulations 2006 (as amended) (TUPE) does not apply to the existing workforce employed by the incumbent contractor in relation to the Services to be performed by the Successful Bidder under the Contract.
2. Bidders are advised to seek independent professional advice regarding TUPE. The Successful Bidder shall indemnify the Pioneer Group against any potential exposure under TUPE in the terms set out in the Contract.
3. **Important Notices for Bidders**

This ITT is made available on condition that it is to be used in connection with bidding for the Contract and no other purpose whatsoever.

* 1. **Confidentiality**

Subject to the exceptions referred to below, the information in this ITT is made available by the Pioneer Group on condition that Bidders shall:

* + 1. at all times treat such information as confidential;
    2. not disclose, copy, reproduce, distribute or pass the information to any other third person or allow any of these things to happen; and
    3. not use the information for any purpose other than for the purpose of making (or deciding whether to make) a bid for the Contract.

Notwithstanding the conditions referred to in paragraphs 2.1.1 to 2.1.3 above, Bidders may disclose, distribute or pass information to another person if:

* + 1. done for the sole purpose of enabling a bid to be made and the person receiving the information undertakes in writing to keep the information confidential on the same terms as set out in this ITT; or
    2. The Pioneer Group gives its prior written consent in relation to such disclosure, distribution or passing of information.

The Pioneer Group may disclose any information relating to the bids to its directors, officers, employees, agents or advisers. The Pioneer Group also reserves the right to disseminate information that is materially relevant to the Contract to all Bidders, even if the information has only been requested by one Bidder. The Pioneer Group shall act reasonably as regards the protection of commercially sensitive information relating to the Bidder.

* 1. **Accuracy of information**

The information contained in this ITT has been prepared by the Pioneer Group in good faith but does not purport to be comprehensive or to have been independently verified. The Pioneer Group does not accept any liability or responsibility for the adequacy, accuracy or completeness of, or makes any representation or warranty (express or implied) with respect to the information contained in the ITT or with respect to any written or oral information made or to be made available to any Bidder or its professional advisors and any liability therefore is hereby expressly disclaimed.

Bidders considering entering into a contractual relationship with the Pioneer Group should make their own enquiries and investigations of the Pioneer Group requirements. The subject matter of this ITT shall only have contractual effect when it is contained in the express terms of an executed agreement.

Nothing in this ITT is, or should be relied upon as a promise or representation as to the future and the Pioneer Group does not undertake to provide Bidders with access to any additional information or to update the information in this ITT or to correct any inaccuracies that may become apparent. The Pioneer Group reserves the right, without prior notice, to change the procedures outlined in this ITT or to terminate discussions and the delivery of information at any time before entering into the Contract.

* 1. **Anti-collusion**

Any Bidder who, in connection with the competition for the selection of Bidders for the Contract:

* + 1. fixes or adjusts its bid by or in accordance with any agreement or arrangement with any other Bidder;
    2. enters into any agreement or arrangement with any other Bidder to refrain from making a bid or to alter, in any way the content of any bid to be submitted;
    3. causes or induces any person to enter into any such agreement as referred to in paragraph 2.3.1 or 2.3.2 above or to inform any other Bidder of the content of any other bid for the Contract;
    4. offers or agrees to pay or give or does pay or give any sum of money, inducement or valuable consideration directly or indirectly to any persons for doing or having done or causing or having caused to be done any act or omission in relation to any other bid or proposed bid for the Contract; or
    5. communicates to any person (outside its consortium, its professional and financial advisers other than the Pioneer Group or any person duly appointed by the Pioneer Group) the content of its proposed bid,

shall be disqualified (without prejudice to any other civil remedies available to the Pioneer Group and without prejudice to any criminal liability that such conduct by a Bidder may attract) from further participation in the competition for the Contract. Bidders are required to return with their bid the Anti-Collusion Certificate set out at Appendix 4.

* 1. **Non-canvassing**

Any Bidder who, in connection with its bid for the Contract

* + 1. offers an inducement, fee or award to any representative of the Pioneer Group or any person acting as an adviser to the Pioneer Group in connection with the selection of Bidders for the Contract; or
    2. does anything which would constitute a breach of the Bribery Act 2010,

shall be disqualified (without prejudice to any other civil remedies available to the Pioneer Group and without prejudice to any criminal liability that such conduct by a Bidder may attract) from further participation in the competition for the Contract. Bidders are required to return with their bid the Non-Canvassing Certificate set out at Appendix 5.

* 1. **Copyright**

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

* 1. **Confidentiality**

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 the Pioneer Group (in relation to the form and content of the proposed publicity).

* 1. **The Pioneer Group’s right to reject bids**

Notwithstanding anything else stated in this ITT, the issue of this ITT in no way commits the Pioneer Group to enter into the Contract or any other agreement whatsoever. The Pioneer Group is not bound to accept any bid and reserves the right to accept any bid either in whole or in part.

The Pioneer Group reserves the right to reject any or all of the responses received and discontinue the bidding process and/or reject any incomplete or incorrectly completed responses.

Bids shall be checked initially for compliance with the requirements of this ITT and for completeness. Clarification may be sought from Bidders in order to determine if a bid is complete and compliant. Bids that are not substantially complete and/or compliant with the requirements of this ITT may be rejected.

* 1. **Time**

The Pioneer Group reserves the right, in its absolute discretion to amend the timetable or extend any time period in this ITT.

* 1. **Bid costs and loss of profits**

Bidders shall bear their own costs and in no circumstances whatsoever shall the Pioneer Group become liable for any bidding costs, nor shall the Pioneer Group be liable for any loss of profits, loss of Contracts or other costs or losses suffered or incurred by a Bidder as a result of that Bidder not being awarded one or more Contracts pursuant to this procurement process. The Pioneer Group shall similarly not be liable in the event that the procurement process is cancelled, whatever the reason.

1. **General Matters**
   1. **General approach**

Although this ITT is not subject to the Public Contracts Regulations 2015, Bidders are reminded that the Pioneer Group will conduct the process in accordance with the key EU procurement principles of transparency, non-discrimination and equal treatment.

* 1. **Enquiries and communication**

During the ITT stage Bidders may submit questions and requests for Clarification or further information. Bidders should note the following procedure for obtaining further information or Clarification on matters arising during the ITT stage:

* + 1. Bidders shall address their questions and requests for Clarification or further information to the contact point set out at Section 1.4 above;
    2. On receipt of a request for Clarification or further information, the Pioneer Group may, at its sole discretion, endeavour to respond to the Bidder and provide such Bidder with any additional information to which the Pioneer Grouphas access, but the Pioneer Groupshall not be obliged to comply with any such request and does not accept any liability or responsibility for failure to provide any such information (and absence of a response from the Pioneer Group shall not entitle a Bidder to make any particular assumptions about the matters sought to be clarified);
    3. Except as stated below, all questions and requests for Clarification or further information and the corresponding responses, shall be circulated by the Pioneer Group to all Bidders;
    4. When submitting a question or request for Clarification or further information, Bidders should indicate whether or not they believe the question or request for Clarification or further information is commercially confidential to them and should not therefore be shared with other Bidders. Any such question or request for Clarification or further information should be marked ***‘Confidential – not to be circulated to other Bidders*’;**
    5. If the Pioneer Group considers that, in the interests of open and fair competition, it is unable to respond to the question or request for Clarification or further information on a confidential basis, it shall inform the Bidder who has submitted it. The Bidder must as soon as practicable thereafter request that either the query be withdrawn or treated as not confidential;
    6. All questions or requests for Clarification or further information must be submitted by **12:00 noon on 28th February 2025** at the latest. Questions or requests for Clarification must be submitted electronically via the [governanceassuranceteam@pioneergroup.org.uk](mailto:governanceassuranceteam@pioneergroup.org.uk)
    7. Requests/questions received after this time shall not be responded to by the Pioneer Group.
  1. **Amendments to the ITT**

The Pioneer Group reserves the right to issue amendments or modifications to this ITT during the ITT stage. These shall be issued to all Bidders simultaneously and bids shall be assumed to take account of any such modifications and amendments.

* 1. **Not Applicable**
  2. **Procedure for the submission of bids**

The closing date for the submission of the completed ITT is **12:00 noon on 14th March 2025**. Completed ITTs must be submitted electronically to the [governanceassuranceteam@pioneergroup.org.uk](mailto:governanceassuranceteam@pioneergroup.org.uk)

Please provide your response to the ITT by completing the required documents. Please do not provide separate or different types or formats of documents unless specifically requested to do so.

Please note that the designated limits on length of responses set out in the ITT must be strictly adhered to. Any question response exceeding the designated limit shall be disregarded beyond that limit. Unless specifically requested to do so, please do not include or upload any standard marketing or promotional material within your answer as this shall be disregarded.

Supporting information (appendices, attachments etc.) should be presented in the same order as, and should be referenced to, the relevant question. Each piece of supporting information shall be limited to 6 sides of A4 paper. Any supporting information exceeding the designated limit shall be disregarded beyond that limit

Late Tender submissions shall not be accepted.

Bidders are strongly recommended not to leave their ITT submission to the last minute. The Pioneer Groupshall not be held liable for failures to submit an ITT on time due to technical issues reported less than 24 hours before the submission deadline.

* 1. **Bidder Interviews**

Following the evaluation of each Bidder’s Pricing Document as set out at Appendix 2 and Method Statement as set out at Appendix 7, the top 3 scoring Bidders shall be invited to attend an Interview with the Pioneer Groupto further explain their proposals for carrying out the Contract they are bidding for.

The provisional dates for these Interviews are as set out at Section 3.7 of this ITT, though the dates, times and venues of the Interviews shall be confirmed with Bidders under separate cover.

The maximum percentage or “weighting” the Pioneer Groupshall give to the Interviews is set out at Section 5.4 of this ITT.

* 1. **Procurement timetable**

The indicative timetable for the procurement process is as set out below:

|  |  |
| --- | --- |
| **Stage** | **Date** |
| ITT made available to Bidders | 14/02/2025 |
| Deadline for requests for Clarification | 28/02/2025 |
| Deadline for submission of bids | 14/03/2025 |
| Bidder Interviews | 2nd April or 3rd April 2025 |
| Notification of result | Friday 11th April |
| Contract commencement | 1st May 2025 |

The Pioneer Groupreserves the right to amend the above timetable.

1. **Bid Return Requirements**
   1. **General**

This Section provides Bidders with details of the form and content of bids that are invited and sets out the procedural requirements with which Bidders must comply when submitting a bid in order for their bid to be considered by the Pioneer Group. The process is intended to:

* + assist the Pioneer Group in choosing the most economically advantageous bid;
  + make clear the requirements with which Bidders must comply and the basis on which the bids shall be evaluated; and
  + maintain competition throughout.

If a Bidder does not comply with the requirements as set out at this Section 4, the Pioneer Group may (in its sole discretion) disqualify the Bidder from the competition.

The bid and any supporting documentation should be appropriately cross-referenced to this ITT. Bids should be as clear and concise as possible, in order to enable the Pioneer Group to evaluate bids in accordance with this ITT.

Bidders shall confine each response to the question being asked. The Pioneer Group shall only evaluate each response against the relevant question. Any Bidder response that is applicable to more than one question shall be repeated as necessary.

Any question response exceeding the designated limit shall be disregarded beyond that limit.

All bids shall be submitted in English. Bidders are reminded that Variant Bids shall not be accepted.

All pricing should be **EXCLUSIVE** of Value Added Tax (VAT).

* 1. **Content of bids**

All bids must consist of the following items/documents:

* + 1. Unconditional acceptance of the Specification as set out in Appendix 1;
    2. A completed Pricing Document set out in Appendix 2;
    3. A completed Form of Tender as set out at Appendix 3 signed by the authorised signatory submitting the bid on behalf of the Bidder;
    4. A completed Anti-Collusion Certificate as set out at Appendix 4, signed by the authorised signatory submitting the bid on behalf of the Bidder;
    5. A completed Non-Canvassing Certificate as set out at Appendix 5, signed by the authorised signatory submitting the bid on behalf of the Bidder;
    6. Unconditional acceptance of the Contract Conditions as set out in Appendix 6;
    7. A completed Method Statement as set out in Appendix 7, specifying how the Bidder shall carry out the Services to be provided under the Contract;
    8. An Anti-Slavery and Human Trafficking Statement setting out how the Bidder has taken steps to ensure that slavery and human trafficking is not taking place in any part of the business or supply chains. The Successful Bidder shall be required to provide an updated statement annually (applicable to Bidders with an annual turnover in excess of £36,000,000).

1. **Evaluation of Bids**
   1. **Introduction**

The purpose of this Section is to provide information to Bidders on the evaluation process for bid submissions and the criteria that shall be used to select the Successful Bidder.

* 1. **Evaluation for compliance**

Bids shall be checked initially for compliance and completeness. Bids that are not substantially complete and/or compliant with this ITT may be rejected. During the evaluation period, the Pioneer Groupreserves the right to call for further information from Bidders to assist it in its consideration of their bids.

* 1. **Not applicable**
  2. **Evaluation criteria**

Bids shall be evaluated on the basis of the criteria set out below to determine the most economically advantageous tender (MEAT). The Pioneer Group has allocated a maximum score for each element as follows:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Area** | **Criteria** | **Weightings** | | |
| **Method Statement\*** | **Interview\*\*** | **Total** |
| **Services Delivery** | **10%** | **10%** | **20%** |
| **Contract Management** | **10%** | **10%** | **20%** |
| **Customer Care** | **10%** | **0%** | **10%** |
| **Quality Assurance** | **10%** | **0%** | **10%** |
| **Price\*\*\*** | | | | **40%** |
| **Total** | | | | **100%** |

\* Bidders should refer to Appendix 7 of this ITT for further details of the % weighting that shall be given to each individual element of the Method Statement in the evaluation.

\*\* Further details of the criteria against which the Bidder Interview shall be assessed shall be provided to Bidders in advance of the Interview.

\*\*\* Bidders should refer to Appendix 2 of this ITT for an explanation as to how the Pricing Document shall be evaluated.

1. **Glossary of Terms**

|  |  |
| --- | --- |
| **Term** | **Meaning** |
| Bidder | The organisation(s) formally invited to submit a tender |
| Clarification | A request from a Bidder for further information regarding the content of the tender documents |
| Contract | The formally agreed document that is created between the Pioneer Group and the Successful Bidder |
| Evaluation Criteria | The list of key criteria that is used to assess a Bidder’s tender |
| ITT | The Invitation to Tender document issued to Bidders |
| Pricing Document | The schedule containing the Bidder’s tender pricing proposal |
| Specification | The technical statement of what is to be provided under the scope of the Contract |
| Successful Bidder | The organisation(s) formally appointed to deliver the Contract |
| TUPE | The Transfer of Undertakings (Protection of Employment) Regulations 2014 |
| Variant Bid | A bid which is different from that specifically requested by the Pioneer Group in the tender documents |

**Appendix 2 – Pricing Document**

**Notes for Bidders**

Bidders are required to complete this Pricing Document.

All pricing should be **exclusive** of Value Added Tax (VAT).

**Pricing Evaluation Methodology**

As stated in Section 5 (Evaluation of Bids) of this ITT document, pricing shall count for 40% of the total marks available for.

The Bidder that submits the lowest Total Contract Sum for shall receive the maximum score of 40%. Each other Bidder’s Total Contract Sums shall be scored based on the following formula:

|  |  |  |
| --- | --- | --- |
| Lowest Total Contract Sum | X | 40% |
| Bidder’s Total Contract Sum |

The Pioneer Groupreserves the right to ask Bidders to clarify elements of their Pricing submission as necessary to ensure that the Pioneer Group is able to evaluate the pricing submissions on a like for like basis.

Tenders considered to be priced abnormally low will be scrutinised. This includes ensuring that this is not as a result of a failure to understand the requirements of the Contract.

The Pioneer Group shall have the right to reject any tender that it considers to be abnormally low, in accordance with the principles set out in Regulation 69 of the Public Contracts Regulations 2015.

**Pricing Preambles**

1. The Pricing Document contains the Bidder’s rates.
2. The descriptions in the Pricing Document shall not be regarded as an exhaustive statement of everything included in the Contract; refer to the Specification for the full Contract requirements. The rates in the Pricing Document shall include for all work shown or described in the Contract as a whole and for all work not described but apparent as being necessary for the provision of the Services.
3. The rates in the Pricing Document shall include for the whole of the Bidder’s obligations under the Contract whether expressly stated or reasonably implied. No additional request for payment shall be permitted unless authorised in writing by the Pioneer Group.
4. All rates are to be fixed until the first anniversary of the Contract commencement. Rates from year 2 onwards shall be subject to review between the parties, and any proposed increase shall be agreed in writing by the Pioneer Group. Any rate of increase shall be limited to a maximum of the prevailing CPI rate at the time of the review, published by the Office for National Statistics.
5. Where quantities are stated in the Pricing Document the Bidder should note that they may vary and there is no guarantee of quantity. The rates quoted in the Pricing Document shall apply regardless of the actual quantity of Services subsequently ordered.
6. The rates shall be sufficient to provide the Services in the Specification in isolation from any other requirement and in any quantity.
7. No quantity or continuity of work is guaranteed to the Bidder and this should be taken into account when completing the Pricing Document. Unless expressly stated to the contrary, any quantities given in the Pricing Document are indicative only.
8. Payment shall be made in accordance with the Pricing Document and the procedures described in the Conditions of Contract attached at Appendix 6.
9. The Bidder shall include all mileage costs and subsistence costs within the submitted rates.
10. The Bidder shall include all costs for the production of any documentation and the attendance of any meetings required by the Pioneer Group under the Contract within the submitted rates.

**Appendix** **3 – Form of Tender**

To: The Pioneer Group

Re: Provision of Specialist Procurement advice & Support (the **“Contract”**)

Dear Sirs

1. Having examined the Invitation to Tender and having satisfied ourselves as to all other matters relevant thereto, we confirm our tender for the Contract.
2. We enclose our tender and confirm that these comprise all of the documents required to be submitted in accordance with the matters set out in the Invitation to Tender. We acknowledge that we are bound by our proposals submitted pursuant to the Invitation to Tender.
3. We hereby unconditionally and irrevocably offer to provide the Services requested to be provided and performed under the Invitation to Tender in accordance with the Contract and at no greater rates or prices than the rates or prices stated in the Pricing Document.
4. We confirm that we are fully conversant with all the Invitation to Tender documentation and that this tender is submitted strictly in accordance with the Invitation to Tender.
5. We agree that this tender shall remain open to be accepted or not by the Pioneer Group and shall not be withdrawn for a period of twelve (12) months from the deadline for receipt of tenders as set out in the Invitation to Tender, or such longer period as may be agreed with the Pioneer Group.
6. We undertake to execute the Contract for the proper and complete fulfilment of the Services required or any part or parts thereof, as you may in your absolute discretion award to us.
7. We agree that we shall commence and undertake the Services required when instructed to do so pursuant to the terms of the Contract.
8. We certify that the details of this tender and the Invitation to Tender documentation have not been communicated to any other person or adjusted in accordance with any agreement or arrangement with any other person or organisation.
9. We acknowledge that the Pioneer Group is not bound to accept the lowest or any tender it may receive and reserve the right at its absolute discretion to accept or not to accept any tender submitted.
10. We certify that we have full power and authority to enter into the Contract and to carry out the Services, and that this is a bona fide tender.
11. We confirm that in submitting our tender, we have satisfied ourselves as to the accuracy and completeness of the information we require in order to do so (including that contained in the Invitation to Tender).

**Bidder’s submitted rates**

Bidders are asked to submit pricing for executing advice and guidance as per the specification (Set out in Appendix 1).

Pricing to be entered per occurrence and not total association requirements.

|  |  |
| --- | --- |
| **Complexity** | **Price in £’s** |
|  |  |
| **Low 0-8 days** |  |
|  |  |
| **Medium 8 – 10 days** |  |
|  |  |
| **High 10 days +** |  |
|  |  |
| **Retainer fee (day rate)** |  |

Low Complexity in words

Medium Complexity in words

High Complexity in words

Signed for on behalf of the Bidder by a duly authorised signatory of the Bidder:

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position/Status: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

On behalf of:

(name of Bidder) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Appendix** **4 – Anti-Collusion Certificate**

To: The Pioneer Group

Re: Provision of Specialist Procurement advice & Support (the **“Contract”**)

The essence of the public procurement process is that the Pioneer Group shall receive *bona fide* competitive tenders from all Bidders. In recognition of this principle we hereby certify that this is a *bona fide* bid, intended to be competitive, and that we have not fixed or adjusted the bid by or under or in accordance with any agreement or arrangement with any other Bidder (other than a member of our own consortium). We have not and insofar as we are aware neither have any of our employees, contractors, advisers, agents, officers or subcontractors:

1. Entered into any agreement with any other person with the aim of preventing bids being made or as to the fixing or adjusting of any bid or the conditions on which any bid is made; or
2. Informed any other person, other than the person calling for this bid, of the content of the bid, except where the disclosure was necessary for the preparation of the bid for insurance, for performance bonds and/or Contract guarantee bonds or for professional advice required for the preparation of the bid; or
3. Caused or induced any person to enter into such an agreement as is mentioned in paragraph (1) and (2) above; or
4. Committed any offence under the Bribery Act 2010, Prevention of Corruption Acts 1889 to 1916 nor under Section 117 of the Local Government Act 1972; or
5. Offered or agreed to pay or give any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other bid or proposed bid any act or omission; or
6. Canvassed any other persons referred to in paragraph (1) above in connection with the Contract; or
7. Contacted any officer of the Pioneer Group about any aspect of the Contract except in a manner permitted by the Invitation to Tender.

We also undertake that we shall not procure the doing of any of the acts mentioned in paragraphs (1) to (7) above before the hour and date specified for the return of the bid nor (in the event of the bid being accepted) shall we do so while the resulting Contract continues in force between us (or our successors in title) and the Pioneer Group.

In this certificate

The word “person” includes any person, body or association, corporate or incorporate and “agreement” includes any arrangement whether formal or informal and whether legally binding or not.

Signed for on behalf of the Bidder by a duly authorised signatory of the Bidder:

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position/Status: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

On behalf of:

(name of Bidder) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Appendix** **5 – Non-Canvassing Certificate**

To: The Pioneer Group

Re: Provision of Specialist Procurement advice & Support (the **“Contract”**)

**Non-Canvassing Certificate**

I/we hereby certify that I/we have not canvassed or solicited any officer or employee of the Pioneer Group in connection with the award of the Contract and that no person employed by me/us or acting on my/our behalf has done any such act.

I/we hereby further undertake that I/we shall not in the future canvass or solicit any officer or employee of the Pioneer Group in connection with the award of the Contract and that no person employed by me/us or acting on my/our behalf shall do any such act.

Signed for on behalf of the Bidder by a duly authorised signatory of the Bidder:

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position/Status: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

On behalf of:

(name of Bidder) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Appendix** **6 – Conditions of Contract**

Bidders - please refer to the Conditions of Contract document that was uploaded to Crown Finder

We confirm unconditional acceptance of the Conditions of Contract as set out in the document uploaded to Crown Finder.

Signed for on behalf of the Bidder by a duly authorised signatory of the Bidder:

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position/Status: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

On behalf of:

(name of Bidder) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Appendix 7 – Method Statement**

The Method Statement is separated into a number of Sections and questions to provide Bidders with clarity on the overall requirements of the Pioneer Group in relation to the quality measures used to evaluate all bids.

Each Section is linked to the Evaluation Criteria detailed in Section 5 (Evaluation of Bids) of this ITT document. The Section weightings are shown in each Section heading

Each question shall be scored on a scale of 0 to 10 by reference to the following scoring guide:

|  |  |
| --- | --- |
| **Score** | **Description** |
| 9-10 | Exceptional. Demonstrates strengths, no errors, weaknesses or omissions and exceeds expectations in some or all respects |
| 7-8 | Good. The standard of response fully meets expectations. |
| 5-6 | Satisfactory. The response is acceptable but with some minor reservations. |
| 3-4 | Poor. The response is deficient in certain areas where the details of relevant response require the reviewer to make certain assumptions. |
| 1-2 | Very Poor. The response is deficient in the majority of areas where the details of relevant response require the reviewer to make frequent assumptions. |
| 0 | Rejected. Response is unacceptable or non-existent, or there is a failure to properly address any issue. |

Half scores are not permitted.

**Section 0 - General Information (Information Only\*)**

|  |  |  |
| --- | --- | --- |
| **0.1** | **Bidder company name** | Insert details |
| **0.2** | **Registered address** | Insert details |
| **0.3** | **Name of person completing the ITT** | Insert details |
| **0.4** | **Telephone number** | Insert details |
| **0.5** | **E-mail address** | Insert details |
| **0.6** | **Company status (e.g. Ltd, Plc, sole trader etc.)** | Insert details |
| **0.7** | **VAT registration number** | Insert details |
| **0.8** | **Company registration number** | Insert details |
| **0.9** | **Please attach copies of your last 2 years’ full accounts including profit and loss and balance sheet figures.** | |
| Accounts enclosed – Yes/No  Insert appendix reference number | |
| **0.10** | **Please provide evidence of the following levels of insurance cover:**   * **Employer’s liability – £10,000,000** * **Public liability – £10,000,000** * **Professional indemnity – £2,000,000** | |
| Insurance evidence enclosed **–** Yes/No  Insert appendix reference number | |
| **0.11** | **Please provide details of any relevant industry accreditations held by you. Please also provide details of any relevant professional qualifications held by your staff.** | |
| Insert accreditation details  Certificate(s) enclosed/ Certificate(s) not enclosed  Insert appendix reference number(s) | |
| **0.12** | **Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act")?** | |
| Yes/No  If Yes, insert the URL link to the relevant section on your website | |
| **0.13** | **Please provide the company name, contact details and a brief description of 2 contracts of a similar nature which demonstrate your experience in relation to the Contract requirement. Any Contract award will be subject to a satisfactory reference being provided by one or both of the named companies. This may involve a physical visit to the named company or companies.** | |

|  |  |  |
| --- | --- | --- |
|  | **Contract 1** | **Contract 2** |
| **Name of customer organisation** |  |  |
| **Point of contact in the organisation** |  |  |
| **Position in the organisation** |  |  |
| **E-mail address** |  |  |
| **Description of contract** |  |  |
| **Contract Start date** |  |  |
| **Contract completion date** |  |  |
| **Estimated contract value** |  |  |

**\*Note to Bidders:**

If any Bidder response raises concerns as to the capability of the Bidder to perform the Contract, the Pioneer Group may seek further clarification from the Bidder. If the Bidder is unable to satisfy the Pioneer Group on the issues raised, the Bidder may be excluded from further evaluation.

1. **Services Delivery**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Element** | **Requirement** | **Weighting** | **Word Count** |
| 1.1 | Compliance with the Specification | Please provide your proposal to deliver procurement support, as set out in the Specification.  Please explain how you will ensure the Services are delivered in accordance with the technical standards as set out in the Specification, and how a high-quality service is delivered at all times. | 10% | 1,500 |
| Bidder response | | | | |
| **Total Services Delivery Method Statement Weighting** | | | **10%** | |

1. **Contract Management**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Element** | **Requirement** | **Weighting** | **Word Count** |
| 2.1 | Allocation of resources | Please provide your proposed allocation of resources to deliver the Contract including:   * Contract management * Contract administration * Supervision   Please also provide the location from where you will deliver this contract from and how clear communication channels within your business will ensure efficiency in delivering the Contract. | 10% | 1,500 |
| Bidder response | | | | |
| **Total Contract Management Method Statement Weighting** | | | **10%** | |

1. **Customer Care**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Element** | **Requirement** | **Weighting** | **Word Count** |
| 3.1 | Minimum Disruption | Please provide your approach to continuous improvement and training as set out in the specification document. | 10% | 1,000 |
| Bidder response | | | | |
| **Total Customer Care Method Statement Weighting** | | | **10%** | |

1. **Quality Assurance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **No** | **Element** | **Requirement** | **Weighting** | | **Word Count** |
| 4.1 | Feedback, Defects and Complaints | Please provide your proposals for:   * Obtaining feedback in relation to the quality of the Services undertaken * Improving Pioneers Processes and Policies where noted | 10% | | 1,500 |
| **Bidder response**  Insert response | | | | | |
| **Total Quality Assurance Method Statement Weighting** | | | | **10%** | |

**Annex 1 – Method Statement Scoring Matrix**

| **Question** | **Basis of assessment/maximum weighted score available** | |
| --- | --- | --- |
| **Section 0 – General Information** | | |
| 0.1 to 0.15 | | Information only |
| **Section 1 – Services Delivery** | | |
| 1.1 | 10% | |
| **Section 2 – Contract Management** | | |
| 2.1 | 10% | |
| **Section 3 – Customer Care** | | |
| 3.1 | 10% | |
| **Section 4 – Quality Assurance** | | |
| 4.1 | 10% | |

**Invitation to Tender Checklist**

Please ensure you have completed the following prior to submitting your Tender.

|  |  |
| --- | --- |
| **Item** | **Completed** |
| All questions answered, or an explanation why a question has not been answered | Yes/No |
| All supporting documentation included and clearly referenced | Yes/No |
| Unconditional acceptance of the Specification (Appendix 1) | Yes/No |
| A completed Pricing Document (Appendix 2) – bid sum matches Form of Tender (Appendix 3) | Yes/No |
| A completed Form of Tender (Appendix 3) – bid sum matches Pricing Document (Appendix 2) | Yes/No |
| A completed Anti-Collusion Certificate (Appendix 4) | Yes/No |
| A completed Non-Canvassing Certificate (Appendix 5) | Yes/No |
| Unconditional acceptance of the Conditions of Contract (Appendix 6) | Yes/No |
| A completed Method Statement (Appendix 7) | Yes/No |
| An Anti-Slavery and Human Trafficking Statement | Yes/No |