

**Cheshire and Warrington  
Local Enterprise Partnership**

**INVITATION TO TENDER**

**FOR**

**Cheshire and Warrington  
Housing Decarbonisation and Retrofit Study**

**15<sup>th</sup> September 2023**

**THE LEP REF: PDF2023/Housing**

**Return Date of ITT: 12 noon Monday 2<sup>nd</sup> October**

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## **SECTION 1 – The LEP Profile**

The Local Enterprise Partnership (the LEP) leads the growth of the Cheshire and Warrington economy through a powerful partnership between the private, public, and voluntary sectors. Our ambition is to be the UK's healthiest, most sustainable, inclusive and growing economy.

Working in collaboration with local government, businesses, educational institutes and other public, private and community sector organisations, we keep Cheshire and Warrington firmly on the map.

## **SECTION 2 – Scope of Procurement**

This procurement exercise is being conducted as a below threshold open tender. The tender documents comprise this ITT document.

The LEP are looking to procure consultancy support for a Cheshire and Warrington Housing Decarbonisation and Retrofit Study from a high-quality provider that delivers a service that is demonstrably focused around the needs of the organisation and its key partners.

This ITT sets out the information which is required in order to assess the suitability of bidders in terms of their quality assurance processes, relationship management, pricing and value for money, service levels and innovative solutions to meet the requirements of the LEP for the Housing Decarbonisation and Retrofit Study.

The successful bidder will be required to deliver services in accordance with all tender documents and subsequent contract. Tenderers are requested to study the specification in detail and ensure that the specified requirements can be met and thus your understanding of our requirements is reflected in your Pricing Schedule return.

The contract is expected to commence w/c 9<sup>th</sup> October 2023, with the exact dates to be agreed depending on the agreement between the successful provider and the LEP.

The LEP wish to secure efficiencies and economies of scale by means of a procurement exercise for meeting the requirements detailed within this documentation. The principle benefits anticipated by the LEP in this procurement include:

- Ability to maximise opportunities for best value and efficient services
- To allow bidders to explore efficiencies, which may be possible by suggesting innovative and cost-effective solutions
- Presentation of cost savings to the LEP in order to maximise economical operational efficiency and value for money
- A resultant contract that meets the tender requirements and supports the LEP and key partners with their ambition.

**The Contract will be awarded for timescales as specified in the brief. Subject to any further funding becoming available there is an option to extend for a further 6 months/50% based on satisfactory performance through continuous monitoring and performance review.**

During the contract life, the successful bidder will need to achieve continuous improvement. Failure to do so may result in the contract being terminated.

The basis of the contract will include:

Undertake research and build upon existing information to produce an evidence base for retrofit in Cheshire and Warrington including:

- Baseline study for each local authority area with ability to aggregate to sub regional level
- Retrofit modelling to determine the types of intervention to achieve carbon neutrality
- Map opportunities - routes to delivery solutions
- Review of existing best practice for retrofit and new housing development decarbonisation considerations for future work.

Refer to section 3 – specification for further detail.

### **SECTION 3 – Specification**

#### ***Overview & Context***

Cheshire & Warrington Local Enterprise Partnership (C&WLEP), on behalf of Cheshire East Borough Council, Cheshire West and Chester Council and Warrington Borough Council are looking to appoint consultants to deliver an evidence base for the sub-region to provide a greater understanding of the challenges and opportunities for decarbonising public, private and charitable sector housing stock.

Local drivers include council climate declarations/plans and a priority of the recent Cheshire and Warrington Sustainable and Inclusive Growth Commission to speed up decarbonisation and retrofitting of the existing housing stock. Our local authorities have experience of delivering home energy efficiency activities, and a vision to create a plan for housing retrofit that works in partnership to decarbonise housing stock and help tackle the climate emergency and reduce fuel poverty.

Through collaborative working in the sub region, partners have identified numerous challenges impacting the residential journey to net zero including affordability and payback, value of homes, skills availability, technologies, conflict with the need to protect properties with architectural/historical merit etc. The scale of the challenge requires collaboration.

The effort to retrofit UK homes is ramping up, and the UK government's commitment to Build Back Greener sets out challenges to retrofit homes, taking a fabric-first approach and providing more efficient space heating. The government's [Retrofit for the future guide](#) and the [LETI climate emergency retrofit guide](#) offer insight on standards. There are also an increasing number of funding streams for retrofit including the Social Housing Decarbonisation Fund and the Green Homes Grant Local Authority Delivery, that have helped to support properties with low energy ratings, or that are off-grid and also to support people on low incomes. Part of the government's 'Green Day' announcement was an extension for the boiler upgrade scheme and the government further announced that it will consult on the technical specifications for the Future Homes Standard and Future Buildings Standard this year with the aim for legislation to take effect in 2025.

It is anticipated that the Cheshire and Warrington Sub Regional Housing Board will be the advisory board for this work, and a project team coordinated by the LEP will steer the delivery.

Funding has been provided by the North West Net Zero Hub, from the Department of Energy Security and Net Zero, and a representative will be part of the project team.

### **Project Aim**

There are multiple aims driving this piece of work which include:

- Reduce use of fossil fuels and reduce carbon
- Support energy security
- Improve energy efficiency
- Save residents money.

### **Details of Requirements**

1. Undertake research and build upon existing information (outlined in ANNEX ONE) to produce an evidence base for retrofit in Cheshire and Warrington presented in an agreed format.
  - a. To undertake a baseline study for each local authority area – Warrington, Cheshire East, Cheshire West and ability to aggregate to subregional level
    - unit type
    - property type
    - property performance
    - housing tenure
    - floorspace
    - building fabric
    - heating system
    - Consumption
    - Local area conditions
    - Deprivation
  - b. To determine the types of intervention to achieve carbon neutrality, retrofit modelling is required including:
    - Identification of scenarios
    - Archetype typology % of stock/Local area conditions (rural/urban and by sub region)
    - Barriers to retrofit by owner type (claimant, LSOA, income, fuel poverty)
    - Decarbonisation options – heat, energy efficiency, renewables
    - Infrastructure
    - Owner types
    - Mixed use
  - c. Map opportunities and routes to delivery solutions including:
    - Funding and finance analysis
    - Technology and infrastructure
    - Delivery models
    - Role of public sector
    - Coordination with new build
    - Skills and jobs required
    - Scale of economic opportunity
2. Identification of best practice / what other areas/authorities are doing around retrofit and decarbonisation of housing including wider housing decarbonisation, sub regional provision

to date and considerations for future work (building on any existing work in the public domain including for example public acceptability).

**The Budget**

£45,000.00

It is anticipated that most of the budget will be used on 1a-c with a smaller share for item 2.

**The Team**

The consultants should have expertise and extensive experience in sustainability / net zero including delivering housing retrofit projects. They should have experience of transformative energy and associated programmes and policy with the ability to provide practical evidence-based advice and arguments deployed appropriately and in line with the work programme. Consortium bids are acceptable provided there is a clear division of roles and responsibilities, and confirmation of which party will be the nominated lead.

**Programme Management**

The contract lead for this work will be Melissa Crellin, Strategy and Public Affairs Director at the LEP, [melissa.crellin@cheshireandwarrington.com](mailto:melissa.crellin@cheshireandwarrington.com), working closely with John Adlen, Growth Director and Project Sponsor on behalf of the Subregional Housing Board, alongside a project team made up of local authority housing team with climate representatives.

**ANNEX ONE - EXISTING EVIDENCE**

The consultant will be provided with an evidence base to support the development of this work and they are responsible for building on this by identifying and filling gaps in the data.

Cheshire and Warrington LEP

[Cheshire and Warrington Sustainable and Inclusive Growth Commission](#)

Cheshire East:

- Parity data will be available
- Carbon Finances Study Synthesis Report 2020. A report produced for Cheshire East which analysed using council tax and business rate to incentivise energy efficiency measure in residential and business properties.

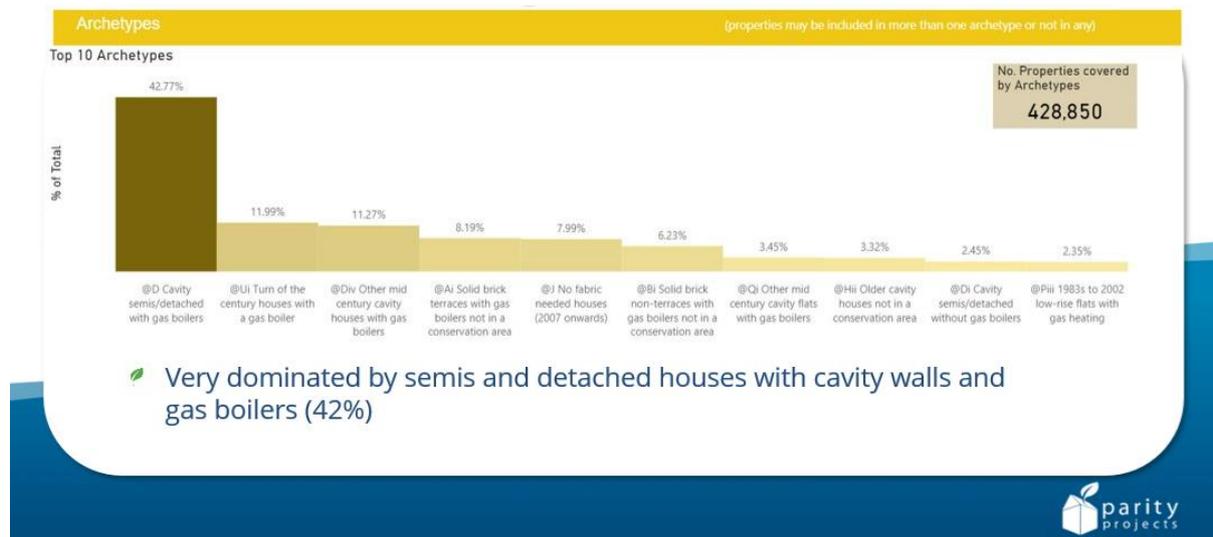
Cheshire West: Will be available

Warrington: Will be available

The North West Net Zero Hub can provide:

- EPC Open data for 50% properties Cheshire and Warrington analysed in 2020 Fuel Type, Tenure, Built Form, Appliances, Off-Gas,
- High level archotyping was undertaken in 2021 (See Table Below)

## Cheshire & Warrington



From outside the region

We recognise recent good practice in considering housing decarbonisation approaches:

[GMCA Retrofit Action Plan \(greatermanchester-ca.gov.uk\)](#)

[Retrofit London | London Councils](#)

[Domestic Retrofit: Market Intelligence & Skills Assessment - Energy Systems Catapult](#)

[Report helps build evidence base for retrofit business case for a large-scale housing retrofit programme - NTCA \(northoftyne-ca.gov.uk\)](#)

## **Programme Management Arrangements**

Day to day project management will be provided by a member of the Net Zero Hub team in Cheshire and Warrington.

The successful consultant will be expected to attend monthly steering group meetings as a minimum during the course of the commission and liaison via telephone and e-mail with officers and key stakeholders as necessary, including potentially for a weekly short progress meeting via Teams.

## **SECTION 4 – Award Criteria**

### **4.1 Award Criteria**

The Contract will be awarded on the basis of the following weighted award criteria:

|              | <b>Award Criteria</b>  | <b>Weighting</b> |
|--------------|--|------------------|
| <b>4.1.1</b> | <b>Understanding the brief</b><br>Submissions which do not, in the opinion of the LEP, adequately meet the Performance Specification will not be marked for the Technical Merit and Price Criteria outlined below and will not be taken forward to any subsequent stages of the Tender evaluation. | <b>PASS/FAIL</b> |
| <b>4.1.2</b> | <b>Value for Money</b>   | <b>20%</b>       |
| <b>4.1.3</b> | <b>Technical Merit (Quality)</b>   | <b>80%</b>       |
|              | <b>TOTAL</b>   | <b>100%</b>      |

The **Technical Merit** criteria is made up of the following sub-criteria:

|                |   |            |
|----------------|---|------------|
| <b>4.1.3.1</b> | <b>Approach and methodology to the commission</b>   | <b>25%</b> |
| <b>4.1.3.2</b> | <b>Track record of undertaking similar commissions</b>  | <b>20%</b> |
| <b>4.1.3.3</b> | <b>The proposed consultancy team, their qualification, expertise and relevant experience</b>        | <b>25%</b> |
| <b>4.1.3.4</b> | <b>Approach to project management and quality assurance, including a project plan and timescale</b> | <b>10%</b> |

Technical scores from the Tender stage will then be added together to give a total **technical score out of 80%** which will then be added to the **Value for Money score (out of 20%) to give an overall score of 100%**.

### **4.2 Supplier Evaluation**

The evaluation of submissions will be on the criteria listed below in **section 4**. The criteria will count for 100% of the overall evaluation with the relevant weightings listed next to each individual criterion stated below.

Evaluation criteria will be a combination of both financial and non-financial factors and will consider the following areas:

#### **4.2.1 Value for Money (20%)**

**The Value for Money criteria carries a weighting of 20%** of the overall achievable score. The supplier must provide an economically sound and commercially attractive proposal offering outstanding customer service and satisfaction.

Please see Appendix 2 pricing Schedule to be completed and returned by all suppliers.

4.2.1.1 Prices submitted as part of this ITT must remain open for acceptance for a **minimum of 120 days** from the closing date for the receipt of offers.

4.2.1.2 Prices must be exclusive of **VAT**. Please see Appendix 2 for Pricing schedule that should be completed and returned as part of your tender response.

4.2.1.3 The contract price will be **fixed** for the duration of the contract.

4.2.1.4 Bidders must demonstrate how their proposals represent overall value for money and how they will assist the LEP with cost initiatives.

#### **4.2.2 Technical Merit (Quality) (80%)**

Quality – **This carries a weighting of 80%** of the overall achievable score and is broken down into the following areas and respective weightings.

|  | <u><b>WEIGHTING</b></u> |
|--|-------------------------|
| <b>1. <u>COMPANY DETAILS</u></b>   |                         |
| i) – iv) Provide company details   | Information only        |
| <b>2. <u>UNDERSTANDING THE BRIEF</u></b>   | <b>Yes/No</b>           |
| <b>3. <u>APPROACH TO AND METHODOLOGY FOR THE COMMISSION</u></b>  |                         |
| i) Outline your approach to and methodology for the commission   | <b>25%</b>              |
| <b>4. <u>RECORD OF SIMILAR DELIVERY</u></b>  |                         |
| i) Minimum of three examples of similar work   | <b>20%</b>              |
| <b>5. <u>CREDENTIAL OF PROJECT TEAM</u></b>  |                         |
| i) Qualifications, expertise and experience of proposed consultancy team including availability for each personnel | <b>25%</b>              |
| ii) CVS (Max 4 pages)  |                         |
| <b>6. <u>APPROACH TO PROJECT MANAGEMENT AND QUALITY ASSURANCE</u></b>  |                         |
| i) Approach to Project Management and Quality Assurance  | <b>10%</b>              |
| ii) Project Plan and Timetable for completing the work   |                         |

Please see Appendix 3 Supplier Technical Questions & Answer sheet to be completed and returned by all suppliers.

The information supplied will be checked for completeness and compliance before Tenders are evaluated. Failure to comply with any of the requirements or any other specified requirements might render a tender liable to disqualification.

**NOTE: If any criteria within the specification document are classed as non-compliant the LEP will not be able to take your tender through to the next stage. If, however, you state that you are non-compliant and are able to provide an alternative solution, the LEP reserve the right to consider the alternative solution. No guarantee will be given that the alternative solution will be accepted.**

### 4.3 Scoring Principles

Submitted Tenders will be assessed against the above criteria and scored using the following points system principles:

| Scoring criteria   | Score |
|--|-------|
| Failure to respond or irrelevant information which fails to meet the requirement | 0     |
| Response is inadequate, significantly failing to meet the requirements           | 1     |
| Response is unsatisfactory partially meets the requirement                       | 2     |
| Response is acceptable and meets the minimum requirement                         | 3     |
| Response is good - better than merely acceptable                                 | 4     |
| Response is excellent, exceeds the requirement and gives added value             | 5     |

Clarifications maybe sought in writing, or by interview/presentation from the suppliers and scores adjusted accordingly. Visits to reference sites may also allow for adjustments to scores.

Full or partial proposals that in the opinion of the LEP are unrealistically low or not reasonable or sustainable (in terms of Quality or Price) may be rejected.

Technical scores will be added together to give a total **technical score out of 80%** which will then be added to the **Value for Money score (out of 20%) to give an overall score of 100%**.

## **SECTION 5 – Submission requirements and timetable**

### **5.1 Closing Date & Submission**

The closing date and time for the receipt of submissions and all requested documentation relating to this stage is **09:00 hours (9am)** on 2<sup>nd</sup> October 2023. Late submissions will not be accepted.

Submissions will only be accepted if they are returned via email to [tenders@cheshireandwarrington.com](mailto:tenders@cheshireandwarrington.com). Bidders should not send their completed submissions to/copy in any other email address.

Tenderers are advised that it is **compulsory** to complete and return **all** of the following documents in the format provided as per the instructions of this ITT. All questions must be answered, where a question does not apply please state “Not applicable”. Failure to complete the documents in full

and/or provide all documentation will result in a non-compliant tender submission and will mean that your tender is not considered.

- 1. Form of Tender Declaration (Appendix 1)**
- 2. Pricing Schedule (Appendix 2)**
- 3. Supplier Technical Questions & Answer Sheet (Appendix 3)**

## **5.2 Tender Queries**

If you have any specific questions concerning this document or the process for submission of your proposal, then please email through to: [tenders@cheshireandwarrington.com](mailto:tenders@cheshireandwarrington.com) no later than c.o.p 21<sup>st</sup> September 2023. Only questions submitted to this email address will be answered. Queries received after this date will not be accepted and will not be responded to.

It would be most helpful if queries could be submitted in one email rather than piecemeal. If any question or request for clarification is considered to be of material significance, both the question and the response may be issued for review by all potential providers in a suitably anonymous form. All communication received from potential providers will be treated in strict confidence but are subject to this paragraph.

## **5.3 Proposed Schedule of Events**

The proposed schedule for the procurement process is as follows. However, the dates indicated, except for the return date should be regarded as indicative at this stage as The LEP reserves the right to extend and / or amend the timetable as necessary. Any major changes will be communicated to all potential tenderers.

| <b>Activity</b>  | <b>Date</b>                                       |
|--|---|
| Invitation to Tender (ITT) Live                                | <b>15<sup>th</sup> September 2023</b>             |
| Deadline for queries   | <b>c.o.p 21<sup>st</sup> September 2023</b>       |
| The LEP response to queries via email/website to all tenderers | <b>c.o.p 26<sup>th</sup> September 2023</b>       |
| Tender submission deadline                                     | <b>12 noon Monday 2<sup>nd</sup> October 2023</b> |
| Interviews   | <b>w/c 2<sup>nd</sup> October</b>                 |
| Evaluation of submissions                                      | <b>w/c 2<sup>nd</sup> October</b>                 |
| Bidders notified of contract award                             | <b>w/c 9<sup>th</sup> October</b>                 |
| Contract signing and start                                     | <b>w/c 9<sup>th</sup> October</b>                 |
| Completion of contract   | <b>End of November 2023</b>                       |

## **5.4 Instructions to tenderers**

Bidders:

- Shall either destroy or return all documentation related to the tender process if The LEP so directs

- Shall ensure that tenders are both technically and arithmetically correct. Should The LEP discover any arithmetical errors in the bidder's tender prices then these shall be pointed out to the bidder who shall immediately correct the errors or they shall be asked to withdraw its tender or hold the prices submitted, at the discretion of The LEP
- Shall not alter the ITT documents. Tender proposals will be deemed to comply entirely with the terms stated therein unless the bidder states otherwise in writing. If any alteration is made or if these instructions are not fully complied with, the tender proposal may be rejected
- Will be deemed to have satisfied themselves as to the sufficiency of their tender proposal and to have included in it all costs which may be incurred in the delivery of the services. They shall also be responsible for satisfying themselves as to the accuracy of all information associated with the contract and that all eventualities have been included

The contract will be entered into on the basis of the total tender package (inclusive of VAT) which will be included as part of the Contract Documents including any amounts or additions made and agreed during the tender proposal assessment period. The LEP reserves the right not to contract or contract only in part with any bidder.

The information supplied within this ITT and accompanying documents reflects The LEP's current view of the services required. Whilst the information in this ITT has been prepared in good faith, it does not purport to be comprehensive or to have been independently verified. This ITT is issued on the basis that:

- The LEP does not accept any liability, responsibility or duty of care to any tenderer for the adequacy, accuracy or completeness of this ITT or for anything said or done in relation to the procurement to which this ITT relates;
- The LEP does not make any (express or implied) representation or warranty either about the information contained in this ITT or on which it is based, or about any written or oral information that may be made available to any bidder;
- Nothing contained in this ITT constitutes an inducement or incentive in any way to persuade an interested person to pursue its interest, submit a tender proposal or enter into any contract;
- Neither this ITT nor any information supplied by The LEP should be relied on as a promise or representation as to its future requirements;
- This ITT is neither an offer capable of acceptance nor is it intended to create a binding contract nor is it capable of creating such a contract by any subsequent actions

The LEP reserves the right to suspend, cancel or withdraw the tender process at any time and will not be responsible for any costs incurred to potential suppliers.

## **SECTION 6 – Terms and conditions of tender submissions**

Please see below for the terms and conditions of this tender. Through submitting a bid on this tender, you are committing to meet and abide by these terms and conditions:

### **6.1 Confidentiality and Disclaimer**

This ITT is not an offer capable of acceptance, but represents a definition of specific legal service requirements and an invitation to submit a response addressing such requirements.

Neither the issue of the ITT to you, your preparation and submission of a tender, or the subsequent receipt and evaluation of your tender by The LEP commits The LEP to award a contract to you or any other bidder, even if all requirements stated in the ITT are met. The LEP is not responsible directly or indirectly for any costs incurred by your firm in responding to this ITT and participating in The LEP's procurement process.

All firms shall keep strictly confidential any and all information contained in this ITT, and other information or documents made available to it by or on behalf of The LEP in connection with this ITT. The firms shall not disclose, nor allow any such information to be disclosed. Submission of a formal response to this ITT will confirm your agreement to observe these confidentiality requirements.

Contact by the firms with The LEP during the bidding process should only be via the contact stated within this ITT. Respondents shall not offer or give any consideration of any kind to any employee or representative of The LEP as an inducement or reward for doing, or refraining from doing, any act in relation to the obtaining or execution of this or any other contract with The LEP.

### **6.2 Material Misrepresentation**

The LEP shall rely on the information provided by the bidder in relation to its offer. In providing the services as specified in the Invitation to Tender documents the successful bidder/tenderer shall comply with the contents of its offer as failure in this respect may constitute a material breach of contract.

### **6.3 Collusive Bidding**

Collusive bidding is unacceptable to The LEP. Any tenderer that is caught by The LEP to be circumventing rules or the law during this tender process will automatically be disqualified from the tender process.

This applies to any bidder who:

- a). Fixes or adjusts the amount of his bid by or in accordance with any agreement or arrangement with any other person, or
- b). Communicates to any person other than The LEP the amount or approximate amount of his proposal (except where such disclosure is made in confidence in order to obtain quotations necessary for the preparation of the tender for instance) or,
- c). Enters into any agreement or arrangement with any other person\* that he shall refrain from bidding or as to the amount of any bid to be submitted, or

d). Offers or agrees to pay or give, or does pay or gives 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 Offer or proposed Offer for the Services or any act or omission will be disqualified (without prejudice to any other civil remedies available to The LEP and without prejudice to any criminal liability which such conduct by a bidder may attract)

\*NB Sub-contracting is permissible where the bidder believes that this will enhance their proposal, however this must be clearly stated.

#### **6.4 Bribery**

Bribery means any offence under the Bribery Act 2010 or related Laws creating offences in relation to offering, promising or giving a bribe or requesting, agreeing to receive or receiving a bribe

The Contractor agrees with the Client that this Contract will operate on the basis of zero tolerance being shown towards any Fraud and/or Bribery. The Contractor shall take all reasonable steps, in accordance with Good Industry Practice, to prevent Fraud and Bribery by Staff and the Contractor (including its shareholders, members, directors) in connection with the receipt of monies from the Client and with the operation of this Contract.

#### **6.5 TUPE**

The following provisions regarding TUPE are extremely important. Please ensure that you read them carefully.

The LEP expects that TUPE will **not** apply to this contract.

In cases of TUPE Tenderers are advised to seek independent professional advice on the effect of TUPE. Tenderers must be prepared to accept all liabilities which may arise as a consequence of the application of TUPE, should it apply. The LEP takes no liability in regards to inaccuracy of TUPE information provided in this tender.

When submitting a Tender, Tenderers are required to include all costs relating to TUPE in their submission.

#### **6.6 Data Protection Act Compliance**

The successful bidder must comply with the UK General Data Protection Regulations (UK GDPR) and all applicable law concerning the processing of personal data and privacy. Full contract terms can be found within the terms and conditions (see Appendix 5).

The LEP privacy notice can be found at: <https://cheshireandwarrington.com/privacy-policy/>

#### **6.7 Social Value**

The LEP's vision to be the healthiest, most sustainable, inclusive and growing economy in the UK, closely aligns to the Government's social value priorities.

Under the Public Services (Social Value) Act 2012 the LEP must consider:

- a) how what is being procured might improve the economic, social and environmental well-being of the area where it exercises its functions, and
- b) how, in conducting the process of procurement, it might act with a view to securing that improvement.

In addition, the National Procurement Policy Statement ([National Procurement Policy Statement.pdf \(publishing.service.gov.uk\)](#)) sets out the following national priorities that should be considered alongside individual local priorities:

- creating new businesses, new jobs and new skills;
- tackling climate change and reducing waste, and
- improving supplier diversity, innovation and resilience.

All successful suppliers must be willing to work closely with the LEP throughout the contract duration to assist them in achieving both their vision and their social value obligations.

**APPENDIX 1 - FORM OF TENDER – TO BE COMPLETED AND RETURNED**

**Declaration by Tenderer**

**ITT Title: Consultancy Support for a Cheshire and Warrington Housing Decarbonisation and Retrofit Study**

1. I, *[insert name]*, certify that I am the person duly authorised to sign tenders for and on behalf of *[insert company name]*, the tenderer, and having read the documents, offer to supply the goods, services or works:
  - as set out in the specification and accompanying tender documents, samples and/or drawings
  - under the terms and conditions indicated
  - at the price (or prices) specified in the attached tender documentation
2. It is agreed that any or other terms and conditions of contract or any caveats, assumptions, reservations or exclusions that may be printed on correspondence emanating from the tender, or any Contract resulting from this tender, shall not be applicable to this tender or agreement.
3. I certify that this is a bona fide tender and that I have not fixed or adjusted the amount of the tender by, or under, or in accordance with any agreement with any other person. I have not done, and undertake that I will not do at any time before the hour and date specified for the return of the tender, any of the following acts:
  - Communicate to a person other than The LEP, the amount or approximate amount of the proposed tender, except where the disclosure, in confidence, of the approximate amount of the tender was necessary to obtain insurance premium quotations required for the preparation of the tender
  - Enter into an agreement or arrangement with any other person that he/she will refrain from tendering or to the amount of any tender to be submitted
  - Offer, or pay, or give, or agree to pay any sum of money or valuable consideration, directly or indirectly to any person for doing, or having done, or causing to be done in relation to any tender or proposed tender, for the said work, any act or thing of the sort described above
4. I further certify that the principles described in paragraph 3 have been, or will be, brought to the attention of all subcontractors, suppliers and associated companies providing services or materials connected with the tender and any contract entered into with the subcontractors, suppliers or associated companies will be made on the basis of the compliance with the above principles by all parties.
5. I understand that The LEP reserves the right, unless the tenderer stipulates to the contrary in the tender, to accept such portion thereof as The LEP may decide. The LEP is not bound to accept the lowest or any tender.
6. I have obeyed the rules regarding confidentiality of tenders and will continue to do so as long as they apply.

7. I can confirm that I accept that any breach of any of the conditions could lead to any tender being rejected or to the rescission of the Contract by The LEP.

|                       |  |
|-----------------------|--|
| Authorised Signatory  |  |
| Date                  |  |
| Name in BLOCK LETTERS |  |
| Job Title             |  |
| Telephone Number      |  |
| E-mail address        |  |

Please ensure that the form is completed and signed before being returned with any other supporting documentation requested, by the due date and time. Use the checklist to ensure that you have submitted the relevant documents.

**APPENDIX 2 – PRICE SCHEDULE – TO BE COMPLETED AND RETURNED**

|                                   |                                       |          |       |
|-----------------------------------|---------------------------------------|----------|-------|
| Staff Broken down by role         |                                       |          |       |
| Staff role/Name                   | Amount of time to be spent on project | day rate | Total |
|                                   |                                       |          | 0     |
|                                   |                                       |          | 0     |
|                                   |                                       |          | 0     |
|                                   |                                       |          | 0     |
| Attendance at meetings            | Number of meetings                    | Rate     |       |
| Travel and subsistence            |                                       |          |       |
| Other costs: please specify       |                                       |          |       |
|                                   |                                       |          |       |
|                                   |                                       |          |       |
| Total Tendered Price (exc of VAT) |                                       |          | 0     |

NB: The price schedule may be returned on an excel spreadsheet.

**APPENDIX 3 - SUPPLIER TECHNICAL QUESTIONS & ANSWER SHEET – TO BE COMPLETED AND RETURNED**

**1. COMPANY DETAILS**

Please provide company details within the table below:

| Question number | Question  | Response |
|-----------------|---|----------|
| 1(i)            | Full name of the potential supplier submitting the information  |          |
| 1(ii)           | Registered office address (if applicable)   |          |
| 1(iii)          | Registered website address (if applicable)  |          |
| 1(iv)           | Trading status<br>a) public limited company<br>b) limited company<br>c) limited liability partnership<br>d) other partnership<br>e) sole trader<br>f) third sector<br>g) other (please specify your trading status) |          |
| 1(v)            | Date of registration in country of origin   |          |
| 1(vi)           | Company registration number (if applicable)   |          |
| 1(vii)          | Charity registration number (if applicable)   |          |
| 1(viii)         | Head office DUNS number (if applicable)   |          |
| 1(ix)           | Registered VAT number   |          |

**2. VALUE FOR MONEY (20%)**

**i).** Considered alongside your pricing schedule (appendix 2), please indicate any additional outputs or outcomes you anticipate as part of your delivery plan, or other considerations regarding value for money.

[ANSWER FEEDBACK](#)

**3. APPROACH AND METHODOLOGY TO THE COMMISSION (25%)**

**i).** Outline your approach to and methodology for the commission

[ANSWER FEEDBACK](#)

ANSWER FEEDBACK

**4. RECORD OF SIMILAR DELIVERY (20%)**

**i). Minimum of three examples of similar work**

ANSWER FEEDBACK

**5. CREDENTIAL OF PROJECT TEAM (25%)**

**i). Qualifications, expertise and experience of proposed consultancy team including availability for each personnel**

ANSWER FEEDBACK

**ii). Tenderers may provide up to 4 pages of CV's in support**

ANSWER FEEDBACK

**6. APPROACH TO PROJECT MANAGEMENT AND QUALITY ASSURANCE (10%)**

**i). Outline your approach to Project Management and Quality Assurance**

ANSWER FEEDBACK

**ii). Project Plan and Timetable for completing the work**

ANSWER FEEDBACK

#### **APPENDIX 4 – KEY PERFORMANCE INDICATORS (KPI'S)**

Please refer to the specification for further details:

A – Detail of work:

1. Undertake research and build upon existing information (outlined in ANNEX ONE) to produce an evidence base for retrofit in Cheshire and Warrington presented in an agreed format.
  - a. To undertake a baseline study for each local authority area – Warrington, Cheshire East, Cheshire West and ability to aggregate to subregional level
    - unit type
    - property type
    - property performance
    - housing tenure
    - floorspace
    - building fabric
    - heating system
    - Consumption
    - Local area conditions
    - Deprivation
  - b. To determine the types of intervention to achieve carbon neutrality, retrofit modelling is required including:
    - Identification of scenarios
    - Archetype typology % of stock/Local area conditions (rural/urban and by sub region)
    - Barriers to retrofit by owner type (claimant, LSOA, income, fuel poverty)
    - Decarbonisation options – heat, energy efficiency, renewables
    - Infrastructure
    - Owner types
    - Mixed use
  - c. Map opportunities and routes to delivery solutions including:
    - Funding and finance analysis
    - Technology and infrastructure
    - Delivery models
    - Role of public sector
    - Coordination with new build
    - Skills and jobs required
    - Scale of economic opportunity
2. Identification of best practice / what other areas/authorities are doing around retrofit and decarbonisation of housing including wider housing decarbonisation, sub regional provision to date and considerations for future work (building on any existing work in the public domain including for example public acceptability).

B – Additional KPIs

1. Attendance at required meetings
2. Consultation with key stakeholders

**APPENDIX 5 – CONDITIONS OF CONTRACT**

The LEP contract for the Supply of Services shall form the basis of the main terms and conditions of the contract (see attached document). The successful bidder must thoroughly read, agree and comply with the Contract Terms & Conditions Agreement.

Contractors Induction Checklist provided in tender documentation will form part of the contract.