

**Invitation to Quote to provide INCREES (Improving Norfolk Carbon Reduction and Energy Efficiency in Existing Stock): Implementation Plan**

Contact: Toby Matthews

Address: Floor LG County Hall, Martineau Lane, Norwich NR1 2DH

Reference: NCCQ42933

Contract commencement date: Wednesday 8th May 2024

Period of Contract: 5 Months

Issue date: Tuesday 2nd April 2024

Closing date: 10am UK time on Wednesday 1st May 2024

**Introduction**

Norfolk County Council (NCC) are delivering the INCREES (Improving Norfolk Carbon Reduction and Energy Efficiency in existing Stock) project.

INCREES (Improving Norfolk Carbon Reduction and Energy Efficiency in existing Stock) will deliver a comprehensive intervention to accelerate and expand Norfolk’s Net Zero responsiveness by:

* Developing an implementation plan in 2024 to enable public sector partners to accelerate the increase in energy efficiency and quality of Norfolk’s housing and commercial stock.

of Requirements

* 1. Overview

Services to be provided will include:

* The Implementation Plan will establish a visible roadmap for the Authority in reducing carbon within Norfolk housing stock. This work will include bringing together stakeholders to develop specification and forward design of the implementation plan that will deliver a place-based carbon reduction and energy efficiency programme to begin in December 2024.

Full details of the requirement can be found in the service specification.

* 1. Fees and payment

The consultancy contract for the compilation of an implementation plan to enable public sector partners to accelerate the increase in energy efficiency and quality of Norfolk’s housing and commercial stock will be remunerated as follows:

Payment Triggers:

* 50% of the total contract value will be paid upfront upon the signing of the contract agreement.
* The remaining 50% of the total contract value will be paid upon successful completion and delivery of the final feasibility study report.

This payment structure ensures equitable compensation for services rendered throughout the duration of the project, with an initial payment to facilitate project commencement and subsequent payment upon satisfactory fulfillment of contractual obligations.

# ITQ Management

* 1. Bid completion

This contract will be awarded under the Terms and Conditions of Contract appended to this Invitation to Quote. Suppliers will need to describe how they will deliver the services to meet all of the above outcomes and requirements in the Supplier Questions.

Please complete:

* Section 4 - Supplier Information
* Section 5 - Supplier Questions
* Section 6 - Pricing Schedule

Receipt of the quote

1. Your response must be received no later than 10am UK time on Wednesday 1st May 2024.
2. Your response must be submitted through email toby.matthews@norfolk.gov.uk
3. The Council may at its sole discretion change any aspect of or stop this procurement exercise at any point and if it stops the exercise does not provide any Supplier with the scores allocated in any marking exercise already undertaken or the reasons for the allocation of those scores.
   1. Clarifications

If you have any questions please email toby.matthews@norfolk.gov.uk

* 1. Selection process

Scoring method for quality

1. The score for each question will be divided by the maximum possible score of five (5) and then multiplied by the individual weighting for that question to give a weighted score.
2. Suppliers must achieve a minimum quality threshold of 50 out of the 90 marks available for quality or the bid will be rejected.
3. Suppliers will be scored on their responses to the Supplier Questions in Section 6 in relation to the requirements of the specification. Each question is separately weighted.

Scoring method for Price

1. The anticipated maximum value of this contract is £50,000
2. The formula to be used to calculate the score for price is as follows:
   * The bid with the lowest total price will be allocated the maximum number of points, with other Bidders being awarded marks in proportion to this price, so that for example a total price that is 30% more expensive will receive 30% fewer marks, one that is 60% more expensive will receive 60% fewer marks etc.
3. A total of 10% of the overall score is allocated to Price.

Overall score

1. The Contract will be awarded to the Supplier whose quote results in the highest combined quality and price score.

|  |  |
| --- | --- |
| **Award Criteria - Weightings for quality and price** | |
| **Overall Price weighting** | 10% |
| **Overall Quality weighting** | 90% |
| **Total** | 100% |

1. All questions will be scored using the following descriptors:

|  |  |
| --- | --- |
| **Descriptors for the award of quality marks** | |
| **The mark to be awarded is that for which the descriptors most closely match the bidder’s response** | **Mark awarded** |
| An excellent response that is realistic, appropriately detailed and specific. There is no material weakness and:   * the approach embodies accepted good practice in all material respects and offers excellent levels of (as appropriate) functionality, performance, environmental performance, ease of use and other relevant characteristics; * the response is tailored to the requirement wherever relevant and, where relevant, to specific circumstances; * all material aspects of the question are fully answered, and the approach described fully meets all material aspects of the requirement; * where relevant the proposal is ambitious in terms of outcomes, and sets out a convincing, coherent and evidence-based approach to achieving the outcomes claimed; and * where relevant, the organisation, qualification and experience of staff assigned to performing the contract are excellent. | 5 |
| A good response that is realistic, appropriately detailed and specific and with only minor weaknesses, where:   * the approach generally embodies accepted good practice and offers good levels of (as appropriate) functionality, performance, environmental performance, outcomes, ease of use and other relevant characteristics; * the response is generally tailored to the requirement where relevant and, where relevant, to specific circumstances; * all material aspects of the question are fully answered, and the approach described meets the material aspects of the requirement, with no or minor exceptions; * where relevant the proposal seeks to deliver a good level of outcome, and sets out a convincing, coherent and evidence-based approach to achieving the outcomes claimed; and * where relevant, the organisation, qualification and experience of staff assigned to performing the contract are good, with only minor deficiencies | 4 |
| A satisfactory response that is realistic in all material respects, and that is at least sufficiently detailed and specific to give general clarity about what is to be delivered and how. There are some weaknesses, but:   * the approach does not materially conflict with accepted good practice and generally offers acceptable levels of (as appropriate) functionality, performance, environmental performance, ease of use and other relevant characteristics; * most material aspects of the question are fully answered, and the approach described meets the material aspects of the requirement, with no or minor exceptions; * while the response may be somewhat generic, it is not inappropriate to the specific circumstances or too high-level to give reasonable clarity and confidence; * where relevant the proposal seeks to deliver acceptable outcomes, and sets out a reasonably convincing, coherent and evidence-based approach to achieving the outcomes claimed; and * where relevant, the organisation, qualification and experience of staff assigned to performing the contract are generally acceptable. | 3 |
| A rather deficient response where:   * there is insufficient detail or specificity to be clear, wholly or for material aspects of the requirement, what is to be delivered and how; * material parts of the question are not answered or material parts of the response are unrealistic or the approach described, in some material respects, appears not to meet the requirement; * the approach described appears, in some material respects, not to deliver expected levels of (as appropriate) functionality, performance, environmental performance, ease of use or other relevant characteristics; * the approach conflicts with accepted good practice in some material respects; * the approach is in material part inappropriately generic or a poor fit with the specific circumstances or context; * the approach is rather unambitious in terms of outcomes or the approach to achieving the claimed outcomes is somewhat unconvincing; and/or * where relevant, the organisation, qualification and experience of staff assigned to performing the contract do not reach the expected levels in some material respects. | 2 |
| An inadequate response that is in part or in aggregate sufficiently unrealistic as to cast serious doubts over deliverability or efficacy or very materially lacking in detail or specificity or where, individually or in aggregate, there are very material weaknesses. | 1 |
| No response or a response with insufficient content to allow meaningful evaluation or a fundamentally unrealistic response or a clearly unacceptable response where the weaknesses, individually or in aggregate, are fundamental.  If any question receives a score of ‘0’, the entire submission will be rejected. | 0 |

# Procurement Timetable

The procurement timetable, outlined below, is for information and potentially subject to change. The council reserves the right to amend any aspect of the timetable during the procurement and evaluation process.

|  |  |  |
| --- | --- | --- |
|  | Invitation to Quote issued | Tuesday 2nd April 2024 |
|  | Deadline for clarifications | 10am UK time on Tuesday 23rd April 2024 |
|  | Deadline for responses | 10am UK time on Wednesday 1st May 2024 |
|  | Contract Award | Friday 3rd May 2024 |
|  | Contract commencement | Wednesday 8th May 2024 |

# Supplier Information

Suppliers are to edit the header of this form to insert their name at the top of every page.

Suppliers are to complete this Form and return it as the front cover of their submission.

Part 1 is information relevant to the procurement. If bidding as a consortium please complete a copy of this form for each organisation bidding.

* 1. Part 1

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name of person or organisation tendering | | | | |  | | | | | |
| Trading as… | | | | |  | | | | | |
| Are you bidding in conjunction with another supplier? | | | | | Answer ‘yes or no’ | | | | | |
| If yes, who is the lead bidder? | | | | |  | | | | | |
| **Person managing bid** | | | | **Director, partner, trustee overseeing bid** | | | | | | |
| Mr/Mrs/Ms/Other | | | | Mr/Mrs/Ms/Other | | | | | | |
| Name |  | | | Name | |  | | | | |
| Address |  | | | Address | |  | | | | |
| Postcode |  | | | Postcode | |  | | | | |
| Country |  | | | Country | |  | | | | |
| Phone |  | | | Phone | |  | | | | |
| Mobile |  | | | Mobile | |  | | | | |
| Email |  | | | Email | |  | | | | |
| **Registered office address** | | | | | **Bidder’s registration numbers, as applicable** | | | | | |
|  | | | | | Company registration no. | | | |  | |
|  | | | | | Charity registration no. | | | |  | |
|  | | | | | VAT registration no. | | | |  | |
| Postcode |  | | | | Level of VAT to be charged | | | | Choose an item. | |
| Country |  | | | | Other relevant reg. no. | | | |  | |
| **Group structure (as applicable)** | | | | | **Type of organisation (select one box only)** | | | | | |
| Name of immediate parent organisation | | |  | | Sole Trader | |  | Public sector | |  |
| Name of ultimate UK holding company | |  | | | Partnership (Unincorporated) | |  | Private Company | |  |
| Company regn. no. of ultimate UK holding co. | |  | | | Limited Liability Partnership (‘LLP’) | |  | Public Limited Company | |  |
| Name of ultimate parent organisation | |  | | | Private Co. Limited by Guarantee | |  | VCSE, please select:  Choose an item. | | |
| If known, DUNS number | |  | | | Other (please write in): | | |  | | |
|  | |  | | | Are you a SME? Yes/No | | |  | | |

Part 2 is information relevant to contract management if you were to be successful and is non-mandatory.

* 1. Part 2

|  |  |  |  |
| --- | --- | --- | --- |
| *Who will manage the contract* | | *Email addresses and phone numbers of relevant contacts, as applicable* | |
| Mr/Mrs/Ms/Other | |
| Name |  | For invoice and payment queries |  |
| Address |  |
| Postcode | For out of hours contact in an emergency |  |
| Country |  |
| Phone |  |
| Mobile |  |
| Email |  |

**If you are not an existing NCC supplier please complete the BACS form below.**

|  |  |
| --- | --- |
| Bank Details | |
| Account Type |  |
| Name of Bank |  |
| Address of Bank |  |
| Sort Code |  |
| Account Number |  |
| Building Society Roll Number |  |
| Name the account is held in |  |
| Pay Method | |
| NB: Norfolk County Council’s preferred method of payment is by BACS and preferred remittance delivery is by email. | |
| Pay Method |  |

# Supplier Questions [90%]

### 1.Methodology and Approach (30 %)

|  |
| --- |
| Please provide a description of your approach to delivering this project. Please illustrate your approach with appropriate evidence of how you will meet the specifications as laid out, including engagement with stakeholders. |
| [please insert your answer here] (maximum 1,000 words) |

### 2.Project Management (30%)

|  |
| --- |
| Please outline a project plan detailing how the scope of this project is delivered on time and within budget considering project milestones.  Please highlight any potential risks, including to meeting the timescales, and how these would be mitigated. |
| [please insert your answer here] (maximum 1,000 words) |

### 3.Knowledge, Skills and Experience (30%)

|  |
| --- |
| Please provide details of personnel working across this project in terms of expertise, knowledge and experience. This section should further include experience and success of relevant projects previously completed by your organisation. |
| [please insert your answer here] (maximum 1,000 words excluding CVs) |

# Price (10%)

1. Insert your organisation’s name in the header
2. Prices must be in £ sterling and exclusive of VAT
3. The total cost will be used to allocate your score for price

The maximum that can be quoted is £50,000 and this includes the flat rate indirect costs. The Council will pay no more than this.

Total Price for evaluation purposes in GBP excluding VAT

|  |
| --- |
| £ |

# Important Legal Notice

1. Any person who participates in this procurement exercise shall be deemed to accept the conditions set out below and the terms and conditions of contract appended to this document. These conditions constitute the entire agreement between the parties concerning the conduct of the exercise.
2. Norfolk County Council (“the Council”) does not make any binding commitment to actual or potential suppliers (“Suppliers”) or to any other party about its conduct of this procurement exercise, other than to abide by its statutory obligations and the express terms of this Important Legal Notice. No other obligation on the Council shall be implied into any contract which may arise between the Council and any Bidder governing the conduct of this exercise.
3. Suppliers shall not, in connection with this procurement exercise, place any reliance upon any communication from the Council (including without limitation any notice published by the Council and any information published on any web site) unless it specifically states that it concerns this procurement exercise and bears the reference number stated on the front page of this document. Suppliers shall not place any reliance on any communication which is not in writing.
4. Information supplied by the Council is subject to constant updating and amendment in the future and is necessarily selective and is supplied for general guidance in the preparation of proposals. It does not purport to contain all of the information which Suppliers may require and Suppliers must satisfy themselves by their own investigations about the accuracy of such information. While the Council has taken all reasonable steps to ensure, as at the date of this document, that the facts which are contained in this Invitation are true and accurate in all material respects, the Council does not make any representation or warranty as to the accuracy or completeness of this Invitation, or the reasonableness of any assumptions on which this document may be based. The Council accepts no liability to Suppliers however arising and whether resulting from the use of the information provided, or any omissions from or deficiencies in the information. As such, the Council cannot accept responsibility for any inaccurate information obtained by Suppliers.
5. Any notice from any person in connection with this procurement exercise shall be sent to through in-tend to the contact person listed on the first page in accordance with the relevant timescales.
6. In inviting potential Suppliers to participate, the Council is not making an offer to enter into any contract for the supply of goods, services or works and does not bind itself to accept any offer it receives.
7. The Council reserves the right at its sole discretion to change any aspect of, or to discontinue this procurement exercise at any point and if it does discontinue the exercise need not provide any Supplier with the scores allocated in any marking exercise already undertaken or the reasons for the allocation of those scores.
8. The Council will not under any circumstances be liable to pay Suppliers for any costs incurred as a result of their participating in this procurement exercise.
9. The Council may exclude from consideration any proposal which is not submitted in full compliance with the conditions and/or instructions contained within this Invitation and shall be under no obligation to consider any extenuating circumstance which may have arisen. The Council’s decision as to whether any response submitted complies with the instructions shall be final.
10. Suppliers may notify the Council of information they wish, acting reasonably, to designate as confidential and the reasons why. Suppliers shall not apply any blanket designation of confidentiality to their entire quote and the Council will not pay any regard to any such designation.
11. The Council is subject to laws concerning access to information including the Freedom of Information Act 2000, the Environmental Information Regulations 2004 and the Audit Commission Act 1998 and may - notwithstanding any claim made by any Supplier that any information is provided in confidence or is confidential in nature – release any information provided to it in accordance with the law, subject to the Council’s discretion concerning any applicable exemption or the application of any public interest test. It is important to note that information may be commercially sensitive for a time, for example, during a quote process, but afterwards it may not be. The timing of any request for information may be extremely important in determining whether or not information is exempt. However Suppliers should note that no information is likely to be regarded as exempt forever.
12. The contents of this Invitation to Quote together with all other information, materials, specifications or other documents provided pursuant or in the course of this procurement process as a whole, or prepared by the Suppliers specifically for such purposes, shall be treated at all times as confidential by the Suppliers. Suppliers shall not disclose any such information, materials, specifications or other documents to any third parties or to any other part of the Suppliers´ company or group or use them for any purpose other than for the preparation and submission of a response to this Invitation or other requirement of the procurement process, nor shall Suppliers publicise the Council’s name or the Invitation to Quote without the prior written consent of the Council.
13. The Suppliers shall ensure that all third parties to whom disclosure is made shall keep any such information, materials, specifications or other documents confidential and not disclose them to any other third party except as set out above.
14. Suppliers must seek the approval of the Council before providing to third parties any information provided in confidence by the Council or its professional advisers or consultants and must maintain a register of all employees and third parties who have access to such information. If so requested by the Council, Suppliers must make such a register available for immediate inspection by the Council or its duly authorised representatives.
15. Any working documents produced by the Council in the course of evaluation shall remain confidential to and the property of the Council and need not be retained by the Council. For the avoidance of doubt, the Council’s only obligation to Suppliers concerning debriefing shall be to provide the Suppliers with a written statement, as approved by the chair of the evaluation panel.
16. Suppliers shall not enter into any agreement or arrangement with any other person with the intent that the other person shall refrain from responding to this Invitation to Quote.
17. Suppliers should not, in connection with the proposed contract:
    1. offer any inducement, fee or reward to any officer or member of the Council or of the commissioning organisations;
    2. do anything which would constitute a breach of section 117(2) of the Local Government Act 1972 or Bribery Act 2010; or
    3. canvass any of the persons referred to in a) in connection with the response about any aspect of the proposed contract or for soliciting information in connection therewith.
18. If any Supplier or any employee of any Supplier or any third party acting on behalf of any Supplier commits an act detailed in clauses 16 to 17 inclusive or offers, promises or gives any bribe or inducement or makes any improper threat or colludes (or offers or agrees to collude) with any other Supplier in connection with this procurement exercise then, in addition to any criminal sanction such conduct may attract, the Council may:
    1. immediately exclude that Supplier’s offer from consideration;
    2. exclude that Supplier from future procurement exercises;
    3. terminate any contract entered into with that Supplier; and
    4. recover from that Supplier the reasonable costs of re-running this procurement exercise and any consequential losses (including loss of anticipated savings) which result from any delay in letting a contract.
19. If any person approaches any Supplier seeking any bribe or making any offer to collude in respect of this procurement exercise, that Supplier is to contact the Council’s Head of Law immediately.
20. All intellectual property rights in this Invitation to Quote and all materials provided by the Council or its professional advisers, consultants or information provided in connection with this Invitation to Quote are and shall remain the property of the Council and/or its professional advisers, consultants and/or information providers. The information they contain shall be used only for the purpose of preparing a proposal and delivering any resulting contract.
21. All responses and submissions provided by any Supplier will form part of the contract should the Supplier be successful.
22. The Council will not accept any variation to the terms of this legal notice and in the event that any Supplier submits any response which seeks to vary the above conditions such purported variation shall be void, even if the Council considers the proposal.
23. In the absence of a formal document signed by the Council and the successful Supplier, and for as long as such absence persists, then the acceptance by or on behalf of the Council of the Supplier’s written response shall itself constitute a binding agreement between the parties, the terms of which unless amended by agreement between the parties shall be the conditions of contract sent out with the Invitation to Quote and the prices and operational proposals set out by the Supplier in their response.
24. Suppliers should view the Procurement Privacy Notice on the council’s website [www.norfolk.gov.uk/what-we-do-and-how-we-work/policy-performance-and-partnerships/policies-and-strategies/corporate/data-protection](http://www.norfolk.gov.uk/what-we-do-and-how-we-work/policy-performance-and-partnerships/policies-and-strategies/corporate/data-protection) and must raise any concerns about the Privacy Notice and how personal information will be handled during the procurement process without delay.

# Supplier's Declaration

1. Suppliers may either print this Form Z on plain white A4 paper, sign and date it with a pen, scan and then upload it as the final part of their submission, or use an electronic signature.
2. Suppliers are to edit the header of this section to insert their organisation’s name at the top of every page of the forms.

##### Declaration

|  |  |  |  |
| --- | --- | --- | --- |
| We agree to the conditions specified in the ‘Important Legal Notice’ at in this Invitation to Quote.  We warrant, represent and undertake to the Council that:   * neither we nor any employee or third party acting on our behalf has offered, promised or given any bribe or inducement or made any improper threat or colluded (or offered or agreed to collude) with any other person in connection with this procurement exercise * we have complied in all respects with this Invitation to Quote * all information, representations and other matters of fact contained in our quote are true, complete and accurate in all respects * we have made our own investigations and research and have satisfied ourselves in respect of all matters (whether actual or contingent) relating to the Quote and have not submitted this Invitation to Quote response and will not have entered into the contract in reliance upon any information, representation or assumption (whether made orally, in writing or otherwise) which may have been made by or on behalf of the Council * we have satisfied ourselves as to the correctness and sufficiency of the information we have inserted in the quote. we have full power and authority to enter into the contract and provide the services * we are of sound financial standing and will have sufficient premises, working capital, skilled staff, and other resources available to us to provide the services in accordance with the contract * we have obtained or are able to obtain all necessary consents, licences and permissions to enable us to provide the services.   We hereby offer to provide the services in accordance with the contract attached as the annexure to this Invitation to Quote which includes for the avoidance of doubt any documents specified in the contract as forming part of the contract including (but not limited to) the prices and operational proposals set out in this quote, the terms and conditions of contract, the Specification and any written clarifications issued or received by the Council prior to the written acceptance of the Council of this quote. We agree that the Council’s acceptance of this quote shall form a binding contract between us on the above terms. | | | |
| Name of bidding Organisation |  | Signature of authorised officer |  |
| Date |  | Position of authorised officer |  |
|  |  | Name of authorised officer |  |
| Name of bidding Organisation |  | Signature of authorised officer |  |
| Date |  | Position of authorised officer |  |
|  |  | Name of authorised officer |  |

|  |  |
| --- | --- |
| *This block will be signed on behalf of Norfolk County Council in the event that your quote is accepted.* | |
| We, Norfolk County Council, hereby accept your offer for the delivery of enhanced training and development of supporting resources for the Insight Apprentice Project and a binding contract now exists between us and you on the above terms.  (To be completed by NCC when the results of the evaluation are known.) | |
| Name of authorised officer |  |
| Position |  |
| Signature |  |
| Name of authorised officer |  |
| Position |  |
| Signature |  |
| Date |  |