



**OPEN PROCEDURE OJEU TENDER WITH  
BUILD IN INFORMATION TO TENDER &  
STANDARD SELECTION QUESTIONNAIRE FOR  
FORTIS PROPERTY CARE  
MATERIALS/MERCHANTS**

**Date Of Issue: 7<sup>th</sup> September 2017**

**Return Date: 23<sup>th</sup> October 2017**

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## **SECTION 1: BACKGROUND**

### **TENDER BACKGROUND**

Fortis Property Care (FPC) requires at least one materials supplier to provide merchant services for the following lots:

- 1. General Building;**
- 2. Plumbing & Heating;**
- 3. Electrical;**
- 4. Roofing;**
- 5. Equipment hire; and;**
- 6. Tool Purchases (power and hand).**

All tenderers have the opportunity to go for one or more of these lots. Historically, FPC has used one main merchant for building services including plumbing/heating and another one for electrical. On top of this has been a historic use of smaller suppliers for ad-hoc and geographically focused items.

FPC's vision is to have a long-term contract with one or more suppliers across these lot areas removing the use of ad-hoc suppliers. We know that this will not remove the need for emergency ad-hoc use but should reduce. Key to this vision is to provide an efficient, modern delivery/management method, with key focus on innovation and consistency obtaining best value for money for the delivery of the service throughout the contracts' life.

The following drivers have been developed to show FPC requirements for our new partner(s):

- 1. Creation of a dedicated supply chain**
- 2. Modernisation of working methods and delivery model**
- 3. Monitoring and analysis of transactions/management information**
- 4. Transparency of operating costs and unit costs**
- 5. Full reimbursement of excess profit over and above agreed targets**
- 6. Providing a social return on investment**

Currently FPC budget £6 million, £5.5 million for tender purposes, for materials expenditure per year (Fortis' current kitchen arrangement is outside of this tender and may be revisited at a later date), the estimated split between lot areas is:

- General building £2.5M
- Plumbing/Heating £1.6M
- Electrical £1M
- Roofing £250K
- Equipment Hire £100K

- Tools £50K

In addition to these Lots FPC will have a small number of specialist materials which will fall outside of this procurement.

All current contracts expire on or before the 31<sup>st</sup> March 2018. You will be required to commit to implementing these contracts within 3 months of an award, however this period may be reduced subject to further clarifications of submissions, scoring and/or due diligence processes. The agreed contract must be implemented by 31<sup>st</sup> March 2018.

FPC are looking for a minimum of **10 years contract** – 5+5.

**A key objective of this procurement is to make a significant saving on current costs by providing a long term contracting arrangement and developing new methods of material delivery to reduce non-productive costs across the FPC business.**

Currently FPC is mainly managed out of the Malvern office (Festival House WR14 1GD), but within the next 18 months; target December 2019, all Fortis and FPC staff will be located within two offices on one site – Progress House, Worcester WR5 1DU. This will help bring the organisation together but will leave FPC without waste management and storage facilities. As part of this tender consideration you will be required to show how the successful partner(s) will assist in future waste management and storage requirements.

Key requirements which FPC are looking to **improve/modernise** as part of this process include:

- van stock management and replenishment (no or very few ad-hoc collections from branch);
- deliveries to site/van (hugely reduce general travel times to collect materials);
- centralised storage within a distribution centre or branch of agreed van stocks, void/heating packs etc to accommodate prompt delivery;
- on time and immediate deliveries;
- electronic ordering and/or centralised call centre;
- core list management including locking down catalogues, agreed common specification, consistency of price;
- eInvoicing (daily via an EDI link);
- key performance indicators/management information (delivered either monthly or quarterly as required);

- returns/credits process (managed by the merchant(s) and communicated regularly);
- contract management (monthly and quarterly requirements);
- kitchen ordering/specification process (may follow on in due course but not priority until Fortis' kitchens have been included, however Rooftop's are in-scope);
- reduction of suppliers' overheads/management costs; and;
- actively reviewing material specification to provide Client(s) with best value for money.

Items duly considered and not required include:

- managed service/store locations (currently have 2: Malvern and Pershore);
- paper invoicing (require full electronic invoicing),
- rebates/contract support rates (all prices must be transparent including all discounts no rebates or money back offers);
- purchase cards (require full electronic ordering); and;
- lots of branches for collection purposes.

Items which have worked, or do work, but may require some change include:

- EDI invoicing (current daily programme in place new interfaces required with successful merchant(s), Fortis' IT aware of project and ready to assist implementation);
- deliveries to site for Programme items (far more deliveries are needed rather than just some planned programme packs);
- wide stock ranges on gas items;
- reasonable material quality standard; and;
- branch network (future safety net, Operatives will not be required to visit a branch other than by prior agreed van stock collections or rare emergency items).

FPC Board has recently approved FPC Business Plan 2017-19 with the following aims underpinning everything:

- Delivering excellent maintenance services to internal and external customers;
- A growing, high performing FPC business; and;
- A modern, commercially focused FPC business delivering efficiencies and financial strength year on year.

The following must be achieved by March 2019:

Excellent Services	Growth & Performance	Commercial Focus
Right-First-Time repairs: 92%	Focus on cost and efficiency	Achieve efficiency targets to 2019
Customer satisfaction with maintenance services: 96%	Attract two new CSV partners through partnerships and alliances	A fully-connected workforce with mobile working solution
Gas servicing compliance: 100%	Increase number of apprentices to one per £1m of turnover	Integrated supply chain to include materials suppliers and sub-contractors
Emergency repairs completed on time: 99.8%	Increased output to five responsive jobs per day	Achieve ISO9001 accreditation
Appointments made and kept 97.5%	Increase number of gas services to seven per day	Revised management structure and single maintenance location

The successful partner(s) will be required to assist FPC with the majority of these aims and objectives over the contract's life. We advise you should consider them in your submission(s).

As part of the Business Plan process FPC Board has set FPC the following challenging efficiency targets, which the tenderers must be aware of, as the ongoing success with whomever is successful will be underpinned by this challenging environment. All parties will be responsible to deliver these targets and through successful partnering we are sure that these can be achieved.

The following efficiency targets are shown collectively over 3 years (up to 2020):

**Workforce-improved productivity – 12%**

**Materials-better buying power and efficiencies – 2.5%**

The stated FPC Key Performance Indicators (KPIs) and targets are as follows, tenderers should consider our proposed KPIs required monthly, their targets and any penalties. Some of these performance measures will be assigned partly or fully to the successful partner(s) and you will be expected to report on these monthly. The full list of KPIs which you must report against monthly are shown later (page 59):

Key Performance Indicators	2017/18	2018/19
Emergency repairs completed on target %	99	99.8
Properties receiving annual gas service %	100	100

Properties with repairs completed Right-First-Time %	92	92
Appointments made and kept %	95	97.5
Average job completions per operative per day	4.5	5
Gas services per day	5	7
Satisfaction with FPC maintenance service %	94	96
Average no of days to complete a repair	10.5	10
Number of apprentices employed per £1m of turnover	1	1

Obviously FPC's relationship with whomever is successful will not single handily achieve all of these targets but you are a critical element in a wider FPC efficiency/improvement programme, your help/advice to achieve this will be vital.

A full copy of the FPC Business Plan can be provided upon request.

#### **ABOUT FORTIS PROPERTY CARE**

FPC is a wholly owned subsidiary of Fortis Living Group (the stock holding company and housing association) and is a non-charitable, commercial trading company (No. 03795555). FPC delivers both responsive, void and planned maintenance. Currently we deliver responsive maintenance to 25,000 properties across the West Midlands.

#### **Completed Work (Fortis & Rooftop)**

<b>Planned Workstream</b>	<b>Combined Total</b>
Responsive Repairs	<b>55,735</b>
Voids	<b>4,061</b>
Gas Services/Appliances	<b>32,913</b>
Kitchens	<b>564</b>
Bathrooms	<b>306</b>
Electrical Upgrades	<b>82</b>
Heating Systems	<b>677</b>
Electrical Inspections (PIR's)	<b>2,227</b>
Roofs	<b>148</b>
Soffits, Fascias & Gutters	<b>75</b>

**Table 1:** Shows 2016/17 Completed Work across our 2 main contracts

Currently we deliver three main contracts: Fortis Living Ltd, Rooftop Housing Group and Nexus Housing (part of the WM Housing Group). We are the in-house

contractor for Fortis Living and are currently in a 10 years Cost Sharing Vehicle (csv) with Rooftop which is due to expire in 2024. The Nexus contract is due to expire Summer 2018 so potentially will have very little involvement with this contract and the total contract value is very small in comparison with the other main contracts.

All clients are not-for-profit housing association based in Worcestershire. Fortis Living and Nexus Housing based in Worcester and Rooftop Housing based in Evesham. The main stock areas are across Worcestershire, east Herefordshire and north Gloucestershire, but with diverse stock in Shropshire, West Midlands, Warwickshire and South Gloucestershire to name but a few. With Fortis currently owning 16,000 and Rooftop 6,500 (Nexus 2,500).

Client targets are to increase stock numbers by 650 per annum over the next 5 years. Fortis/Rooftop responsive repairs, voids and programme works are delivered in a wide area from Shrewsbury (north) to Stroud (south), Kington (west) to Warwick (east) and many parts in between.

FPC employs **237 Operatives** (as of June '17) across the main trades: gas, plumbing, electrical, carpentry, bricklayer and labourers etc; this figure includes apprentices; 138 working on responsive, voids and gas contracts (this figure updated late August). Many of our experienced team are multi-skilled across two or more areas, some have progressed up from apprentice level to fully qualified multi-skilled operative.

The following are the home locations of the Responsive Repairs team including Gas, this may be useful when building your delivery/van stock replenishment model:

Row Labels	Carpenter	Electrician	Gas Engineer	Labourer	Multi-skill Operative	Plumber	Roofer	Wet Trade	Grand Total
Alcester	1								1
Bewdley			3						3
Birmingham	1		3		1	1			6
Bromsgrove	1	1	1					1	4
Bromyard	1								1
Cinderford				1					1
Droitwich Spa	1	3		2	2				8
Dudley			1						1
Evesham			1						1
Gloucester	1	1			1			1	4
Halesowen			1						1
Hereford		1	3		1			1	6
Kidderminster		3	1		1				5
Ledbury				1	1				2
Leominster					2				2
Malvern	3	3	6	2	3	2			19
Martley					2				2
Pershore					1	1			2
Redditch	1	2	2	1	1	2			9

Stourbridge			1			1	1	1	4
Stourport-on-Severn		1		1					2
Stroud		1							1
Tenbury Wells		1			1				2
Tewkesbury		1							1
Upton upon Severn		1	1						2
Wolverhampton	1								1
Worcester	6	8	5	1	8	7	1	11	47
<b>Grand Total</b>	<b>17</b>	<b>27</b>	<b>29</b>	<b>9</b>	<b>25</b>	<b>14</b>	<b>2</b>	<b>15</b>	<b>138</b>

**Table 2: Operative Home Location by Trade: Responsive, Voids & Gas Only (August 2017)**

Trade	Home	Trade	Home	Trade	Home
Carpenter	B32 4LJ	Gas Engineer	B14 4QB	Multi-skill Operative	B38 9UW
Carpenter	B49 5JT	Gas Engineer	B31 5BU	Multi-skill Operative	B98 8ET
Carpenter	B60 4BZ	Gas Engineer	B42 2EF	Multi-skill Operative	DY102YA
Carpenter	B80 7HD	Gas Engineer	B60 4LY	Multi-skill Operative	GL19 3PT
Carpenter	GL1 2EZ	Gas Engineer	B63 4DY	Multi-skill Operative	GL3 1LQ
Carpenter	HR7 4TU	Gas Engineer	B96 6ET	Multi-skill Operative	HR2 7PT
Carpenter	WR14 1PF	Gas Engineer	B98 6BW	Multi-skill Operative	HR6 8SQ
Carpenter	WR14 1RB	Gas Engineer	DY12 1EB	Multi-skill Operative	HR6 9AP
Carpenter	WR14 2EL	Gas Engineer	DY12 2UF	Multi-skill Operative	WR10 2QE
Carpenter	WR2 6DG	Gas Engineer	DY12 3AH	Multi-skill Operative	WR14 2YA
Carpenter	WR3 8DH	Gas Engineer	DY14 9XD	Multi-skill Operative	WR14 3NP
Carpenter	WR3 8QS	Gas Engineer	DY4 0AE	Multi-skill Operative	WR14 4AH
Carpenter	WR4 9JT	Gas Engineer	DY8 5UG	Multi-skill Operative	WR15 8JA
Carpenter	WR4 9LS	Gas Engineer	HR4 0NU	Multi-skill Operative	WR2 4LX
Carpenter	WR4 9RS	Gas Engineer	HR4 9RW	Multi-skill Operative	WR2 4XJ
Carpenter	WR9 9HX	Gas Engineer	HR4 9UE	Multi-skill Operative	WR2 6RA
Carpenter	WV4 5ND	Gas Engineer	WR11 8AB	Multi-skill Operative	WR3 7UP
Electrician	B61 8UA	Gas Engineer	WR13 5JL	Multi-skill Operative	WR4 0HZ
Electrician	B97 6JQ	Gas Engineer	WR14 1BN	Multi-skill Operative	WR4 9BB

Electrician	B98 7PY	Gas Engineer	WR14 1DT	Multi-skill Operative	WR4 9SB
Electrician	DY10 2TH	Gas Engineer	WR14 1NB	Multi-skill Operative	WR5 1QW
Electrician	DY11 6AQ	Gas Engineer	WR14 2LE	Multi-skill Operative	WR6 6HG
Electrician	DY11 6JQ	Gas Engineer	WR14 2UH	Multi-skill Operative	WR6 6PY
Electrician	DY13 9LR	Gas Engineer	WR2 4JN	Multi-skill Operative	WR9 7QH
Electrician	GL10 3JW	Gas Engineer	WR2 5PT	Multi-skill Operative	WR9 9DA
Electrician	GL20 8GN	Gas Engineer	WR3 8RN	Plumber	B31 2LT
Electrician	GL3 3DF	Gas Engineer	WR4 0EL	Plumber	B98 7LS
Electrician	HR2 7FG	Gas Engineer	WR4 9NG	Plumber	B98 9JL
Electrician	WR14 1PN	Gas Engineer	WR8 0JD	Plumber	DY5 4EY
Electrician	WR14 2ER	Wet Trade	B61 9AL	Plumber	WR1 1QG
Electrician	WR14 2SS	Wet Trade	DY5 3GZ	Plumber	WR10 1HU
Electrician	WR15 8GB	Wet Trade	GL19 3RS	Plumber	WR14 1LR
Electrician	WR2 4EP	Wet Trade	HR2 0EU	Plumber	WR14 1TL
Electrician	WR2 5HF	Wet Trade	WR2 4AD	Plumber	WR2 5LQ
Electrician	WR2 5NF	Wet Trade	WR2 5AW	Plumber	WR3 8RS
Electrician	WR2 5PY	Wet Trade	WR2 5PZ	Plumber	WR4 9NA
Electrician	WR2 6EQ	Wet Trade	WR2 5TJ	Plumber	WR4 9AH
Electrician	WR3 7QQ	Wet Trade	WR4 9UL	Plumber	WR5 1HH
Electrician	WR3 8EY	Wet Trade	WR4 9XS	Plumber	WR5 1NF
Electrician	WR3 8QE	Wet Trade	WR4 9XY	Labourer	B98 7LS
Electrician	WR8 9DT	Wet Trade	WR5 1LA	Labourer	DY13 0NR
Electrician	WR9 7QT	Wet Trade	WR5 1NE	Labourer	GL14 2SA
Electrician	WR9 8PE	Wet Trade	WR5 1PH	Labourer	HR8 2AE
Electrician	WR9 8QY	Wet Trade	WR5 2DL	Labourer	WR13 6SE
Roofer	DY8 5PE			Labourer	WR14 2HB
Roofer	WR2 6RW			Labourer	WR2 6LD
				Labourer	WR9 0RW
				Labourer	WR9 8SZ

**Table 3:** Home Locations of FPC's Responsive/Voids/Gas Team Only (as at 08/17)

2017/18 Planned Programme looks like this, we expect the next 3-5 years to look similar, there will be some changes as demands change against the life-cycle of a planned upgrade programme:

Planned Workstream	Combined Client Total
Kitchens	640
Bathrooms	330
Electrical Upgrades	116
Heating	726
Electrical Inspections (PIR's)	1,994
Roofs	184

Soffits, Fascias & Gutters	59
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**Table 4: 2017/18 Planned Programme Upgrades**

We can confirm that client expect an average of 640 kitchens, 330 bathrooms over the next 5 years and a c.£1.3M roofing programme.

**TUPE**

To manage our responsibility under the Transfer of Undertakings (Protection of Employment) Regulations 2006, our incumbent has indicated that they believe TUPE will apply in relation to our current managed stores (Malvern and Pershore). Provisional Employee Liability Information (ELI) has been provided as an attachment to provide some outline details, see **Attachment 6**. Further details will be made available post tender conclusion and through the due diligence process, we believe the information provided will assist you in your TUPE calculations. If you have any queries/questions around this we will facilitate any responses back from our current provider.

**STOCK PROFILE**

To provide further knowledge on stock numbers and jobs completed, please see **Appendix 4 – Heat Maps:**

1. Combined Property Locations (Fortis & Rooftop) *(as at March '17)*
2. Combined Completed Responsive Jobs (Fortis & Rooftop) *(as at February '17, showing 8 months' worth of completions)*
3. Responsive Repairs, Voids & Gas Team Home Locations *(as at May '17)*

In terms of stock density, FPC's operating area has always been around the Worcestershire towns of Worcester, Droitwich Spa, Malvern, Pershore and Evesham and the Herefordshire towns of Ledbury and Bromyard – this will not change. However, what is changing is where the current New Build programme is located. The client's development departments have targets to complete 650 new units per annum, this is taking them further afield in search of appropriate locations. Recently this has seen an expansion in new units in both Warwickshire and Gloucestershire.

**LOTS**

Please tick which Lot Areas you are interested in, by Lot Area we mean material focus not supply area – all relate to our complete stock/service areas:

Lot No	Lot Area	Please Tick
001	Supply of General Building Materials	
002	Supply of Plumbing/Heating Materials	
003	Supply of Electrical Materials	
004	Supply of Roofing Materials	
005	Plant & Equipment Hire	

<b>006</b>	Supply of Power & Hand Tools	
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**TIMETABLE**

<b>Date</b>	<b>Action</b>
<b>4<sup>th</sup> September</b>	Issue OJEU Contract Notice
<b>7<sup>th</sup> September</b>	Issue Contracts Finder Notice and attach documentation: <b>Tender Period Starts</b>
<b>23<sup>rd</sup> October</b>	<b>Deadline for ITT Submissions</b> (including SQ section)
<b>23<sup>rd</sup> – 17<sup>th</sup> November</b>	ITT Scoring Period
<b>W/C 20<sup>th</sup> and/or 27<sup>th</sup> November</b>	Clarification Meetings/Site Visits (if required)
<b>W/C 4<sup>th</sup> December</b>	FPC Approval
<b>W/C 11<sup>th</sup> December</b>	Issue OJEU Contract Award Notice/Inform All Tenderers
<b>W/C 2<sup>nd</sup> January 2018</b>	Standstill Period Ends – Begin Contract Implementation and Contract Signing Process

**Note:** FPC reserves the right to vary this timetable at its sole discretion.

## **SECTION 2: STANDARD SELECTION QUESTIONNAIRE (SQ)**

### **NOTES FOR PROSPECTIVE TENDERERS**

This Standard Selection Questionnaire (SQ) sets out the information that FPC deems relevant to select partners who will then be able to complete the main tender document attached. Please read these requirements carefully if you don't think you can meet the set minimum standard then we would strongly suggest not wasting either parties time. These requirements are both standard expectations and project minimum requirements which we must have total confidence in your ability to deliver before we can move on to review your delivery and price proposals.

Applicants must complete this document and it is important to respond using the question numbers, retaining the same order. Please also note that responses can be either emailed in or sent in, but must be with FPC by the stated ITT Deadline.

The completed questionnaire submitted by the due date will be evaluated via pass/fail and scored questions. Sections 1 is for information only, Section 2 is pass/fail and if your submission does not meet the minimum standard or you are unable to self certify to that minimum standard you will automatically fail the SQ.

A number of the questions are simply for information only, providing FPC with background on your business and confidence that you have the ability to deliver. A number of questions are also scored (these will be scored by a selection panel).

FPC intends to take through to Invitation to Tender (ITT) stage any contractor passing all questions within this SQ document.

The generic scoring matrix is set out below. Please be aware that if any of your scored entries score a '0' you will automatically fail this SQ and FPC will not continue with any further scoring. All pass/fail sections will be assessed by the overall assessment panel lead by Fortis Living's Procurement Manager and FPC's Managing Director Bill Tebay. For those SQs which pass such tests, the remaining questions will be scored. Please note that evidence for your self-certified SQ responses will be sort as part of the tender evaluation stage ahead of formal award stage. Please be aware that if your circumstances change through this process and you did not meet the minimum standards or fail on any of the exclusion grounds you will fail the tender process at whichever point the standard SQ sessions are checked (parts 1 and 2).

The below scoring table will be used for both stages of this tender: pre qualification and information to tender:

<b>Criteria</b>	<b>Score</b>
<b>Exceptional</b> Demonstrates strengths, no errors, weaknesses or omissions and exceeds expectations in some or all respects.	<b>10</b>
<b>Good</b> The standard of evidence fully meets expectations.	<b>8</b>
<b>Satisfactory</b> The evidence is acceptable but with some minor reservations.	<b>6</b>
<b>Doubtful</b> The evidence is in part acceptable but with some major reservations.	<b>4</b>
<b>Poor</b> The evidence is deficient in certain areas where the details of relevant evidence require the reviewer to make large assumptions.	<b>2</b>
<b>Rejected</b> Evidence is unacceptable or non-existent, or there is a failure to properly address any issue.	<b>Fail (0)</b>

Any questions regarding this questionnaire should be directed to:

**Richard Orders (Procurement Manager)**

**Tel: 01905 670124**

**Email: [rororders@fortisliving.com](mailto:rororders@fortisliving.com)**

Information contained within the completed SQ will be contractual information; the SQ will form part of the contract documents for the appointed party. Any errors within the SQ will therefore be regarded as a breach of contract and if you are unable to support your self-certification or any other claims made within your submitted SQ will lead to automatic exclusion and a potential three (3) year tendering exclusion. Utmost care should therefore be taken to ensure the accuracy of all information and if you believe you cannot honestly self certify then you are better off pulling out at SQ stage instead of waiting for the information to be found to be incorrect. Any information, which at the time of submission is provisional, should be carefully marked as such.

The questionnaire **MUST** be returned by **1PM Monday 23<sup>rd</sup> October 2017 along with the full tender document return**. You must submit the full tender pack in writing to: **Fortis Living/Fortis Property Care, Festival House, Grovewood Road, Malvern WR14 1GD** (tender label attached to your tender pack or available upon request).

### **High Level Criteria**

**Section A** requires you to provide background information about your organisation.

**Section B** requires you to provide evidence that you satisfy FPC's pre-requisites to be considered for ITT and includes a number of pass/fail questions including insurance levels, history of the organisation and its key employees, its audited accounts, and both equalities and health/safety policies. Any items where FPC at its sole discretion considers that you do not meet its requirements will preclude your organisation from being invited to tender.

**Section C** requires you to provide reference sites that match as closely as possible the goods, works or services to be provided under contract (obviously any company FPC works for cannot be used as a reference site). Referees will be asked to provide information about your performance, we may wish to visit one of your referees as part of the tender evaluation process. These responses will be ranked by FPC and the relevant number of organisations, stated above, will be invited to submit a tender, provided that they continue to express an interest to do so.

### **Potential Supplier Information and Exclusion Grounds: Part 1 and Part 2.**

The standard Selection Questionnaire is a self-declaration, made by you (the potential supplier), that you do not meet any of the grounds for exclusion<sup>1</sup>. If there are grounds for exclusion, there is an opportunity to explain the background and any measures you have taken to rectify the situation (called self-cleaning). Failure to provide evidence to explain the situation around the exclusion ground(s), for example, what has changed, how it will not happen again, etc must be provided in detail or your application will be failed automatically.

A completed declaration of Part 1 and Part 2 provides a formal statement that the organisation making the declaration has not breached any of the exclusions grounds. Consequently, we require all the organisations that you will rely on to meet the selection criteria to provide a completed Part 1 and Part 2. For example, these could be parent companies, affiliates, associates, or essential sub-contractors, if they are relied upon to meet the selection criteria. This means that where you are joining in a group of organisations, including joint ventures and partnerships, each organisation in that group must complete one of these self-declarations. Sub-contractors that you rely on to meet the selection criteria must also complete a self-declaration: Parts 1

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<sup>1</sup> For the list of exclusion please see [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/551130/List\\_of\\_Mandatory\\_and\\_Discretionary\\_Exclusions.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf)

and 2 (although sub-contractors that are not relied upon do not need to complete the self-declaration).

When completed, this form is to be sent back to the contact point given in the procurement documents along with the selection information requested in the procurement documentation and your ITT return if you feel your organisation will, have no issues in passing the SQ element of the process.

### **Supplier Selection Questions: Part 3**

The procurement document, details found later on in this document, will provide instructions on the selection questions you need to respond to and how to submit those responses. If you are bidding on behalf of a group (consortium) or you intend to use sub-contractors, you should complete all of the selection questions on behalf of the consortium and/or any sub-contractors.

If the relevant documentary evidence referred to in the Selection Questionnaire is not provided upon request and without delay we reserve the right to amend the contract award decision and award to the next compliant bidder.

### **Consequences of Misrepresentation**

If you seriously misrepresent any factual information in filling in the SQ, and so induce an authority to enter into a contract, there may be significant consequences. You will be excluded from the procurement procedure, and from bidding for other contracts for three (3) years. If a contract has been entered into you may be sued for damages and the contract will be rescinded. If fraud, or fraudulent intent, can be proved, you or your responsible officers may be prosecuted and convicted of the offence of fraud by false representation, and you must be excluded from further procurements for five (5) years.

## **FORTIS PROPERTY CARE - MATERIALS SERVICES 03-17 - OPEN**

### **Notes for completion**

1. The “authority” means the contracting authority, or anyone acting on behalf of the contracting authority, that is seeking to invite suitable candidates to participate in this procurement process.
2. “You”/“Your” refers to the potential supplier completing this standard Selection Questionnaire i.e. the legal entity responsible for the information provided. The term “potential supplier” is intended to cover any economic operator as defined by the Public Contracts Regulations 2015 (referred to as the “regulations”) and could be a registered company; the lead contact for a

group of economic operators; charitable organisation; Voluntary Community and Social Enterprise (VCSE); Special Purpose Vehicle; or other form of entity.

3. Please ensure that all questions are completed in full, and in the format requested, see below. If the question does not apply to you, please clearly state 'N/A'. Should you need to provide additional information in response to the questions, please submit a clearly identified annex.
4. The authority recognises that arrangements set out in section 1.2 of the standard SQ, in relation to a group of economic operators (for example, a consortium) and/or use of sub-contractors, may be subject to change and will, therefore, not be finalised until a later date. The lead contact should notify the authority immediately of any change in the proposed arrangements and ensure a completed Part 1 and Part 2 is submitted for any new organisation relied on to meet the selection criteria. The authority will make a revised assessment of the submission based on the updated information.
5. For Part 1 and Part 2 every organisation that is being relied on to meet the selection must complete and submit the self-declaration. For the purposes of this procurement this means the Lead Contractor and any identified key sub-contractors especially tier 1 sub-contractor(s).
6. For answers to Part 3 - If you are bidding on behalf of a group, for example, a consortium, or you intend to use sub-contractors, you should complete all of the questions on behalf of the consortium and/or any sub-contractors, providing one composite response and declaration.

The authority confirms that it will keep confidential and will not disclose to any third parties any information obtained from a named customer contact, other than to the Cabinet Office and/or contracting authorities defined by the regulations, or pursuant to an order of the court or demand made by any competent authority or body where the authority is under a legal or regulatory obligation to make such a disclosure.

**NB:** All appropriate questions must be answered, the number of lots you are tendering for does not matter. Some questions subject to the lot may depend on the Pass mark but everything requiring an answer must be answered and passed before we will consider scoring your ITT proposal.

## Part 1: Potential Supplier Information

Please answer the following questions in full. Note that every organisation that is being relied on to meet the selection must complete and submit the Part 1 and Part 2 self-declaration.

Section 1	Potential Supplier Information	
Qu No.	Question	Response
1.1(a)	Full name of the potential supplier submitting the information.	
1.1(b)-(i)	Registered office address (if applicable).	
1.1(b)-(ii)	Registered website address (if applicable).	
1.1(c)	Trading status: a) public limited company b) limited company c) limited liability partnership d) other partnership e) sole trader f) third sector g) other (please specify your trading status)	
1.1(d)	Date of registration in country of origin.	
1.1(e)	Company registration number (if applicable).	
1.1(f)	Charity registration number (if applicable).	
1.1(g)	Head office DUNS number (if applicable).	
1.1(h)	Registered VAT number.	
1.1(i)-(i)	If applicable, is your organisation registered with the appropriate professional or trade register(s) in the member state where it is established?	Yes <input type="checkbox"/> No <input type="checkbox"/>
1.1(i)-(ii)	If you responded yes to 1.1(i)-(i), please provide the relevant details, including the registration number(s).	
1.1(j)-(i)	Is it a legal requirement in the state where you are established for you to possess a particular authorisation, or be a member of a particular organisation in order to provide the services specified in this procurement?	Yes <input type="checkbox"/> No <input type="checkbox"/>
1.1(j)-(ii)	If you responded yes to 1.1(j)-(i), please provide additional details of what is required and confirmation that you have complied with this.	

1.1(k)	Trading name(s) that will be used if successful in this procurement.	
1.1(l)	Relevant classifications (state whether you fall within one of these, and if so which one): a) Voluntary Community Social Enterprise (VCSE) b) Sheltered Workshop c) Public service mutual	
1.1(m)	Are you a Small, Medium or Micro Enterprise (SME) <sup>2</sup> ?	Yes <input type="checkbox"/> No <input type="checkbox"/>
1.1(n)	Details of Persons of Significant Control (PSC), where appropriate: <sup>3</sup> - Name; - Date of birth; - Nationality; - Country, state or part of the UK where the PSC usually lives; - Service address; - The date he or she became a PSC in relation to the company (for existing companies the 6 April 2016 should be used); - Which conditions for being a PSC are met: - Over 25% up to (and including) 50%, - More than 50% and less than 75%, - 75% or more. <sup>4</sup> (Please enter N/A if not applicable)	
1.1(o)	Details of immediate parent company: - Full name of the immediate parent company - Registered office address (if applicable) - Registration number (if applicable) - Head office DUNS number (if applicable) - Head office VAT number (if applicable) (Please enter N/A if not applicable)	
1.1(p)	Details of ultimate parent company: - Full name of the ultimate parent company - Registered office address (if applicable) - Registration number (if applicable)	

<sup>2</sup> See EU definition of SME [https://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition\\_en](https://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en)

<sup>3</sup> UK companies, Societates European (SEs) and limited liability partnerships (LLPs) will be required to identify and record the people who own or control their company. Companies, SEs and LLPs will need to keep a PSC register, and must file the PSC information with the central public register at Companies House. [See PSC guidance](#).

<sup>4</sup> Central Government contracting authorities should use this information to have the PSC information for the preferred supplier checked before award.

	- Head office DUNS number (if applicable) - Head office VAT number (if applicable) (Please enter N/A if not applicable)	
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**NOTE:** A criminal record check for relevant convictions may be undertaken for the preferred suppliers and the persons of significant control of them.

Please provide the following information about your approach to this procurement:

Section 1		Bidding Model					
Qu No.	Question	Response					
1.2(a) - (i)	Are you bidding as the lead contact for a group of economic operators?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please provide details listed in questions 1.2(a) (ii), (a) (iii) and to 1.2(b) (i), (b) (ii), 1.3, Section 2 and 3.  If no, and you are a supporting bidder please provide the name of your group at 1.2(a) (ii) for reference purposes, and complete 1.3, Section 2 and 3.					
1.2(a) - (ii)	Name of group of economic operators (if applicable).						
1.2(a) - (iii)	Proposed legal structure if the group of economic operators intends to form a named single legal entity prior to signing a contract, if awarded. If you do not propose to form a single legal entity, please explain the legal structure.						
1.2(b) - (i)	Are you or, if applicable, the group of economic operators proposing to use sub-contractors?	Yes <input type="checkbox"/> No <input type="checkbox"/>					
1.2(b) - (ii)	If you responded yes to 1.2(b)-(i) please provide additional details for each sub-contractor in the following table: we may ask them to complete this form as well.						
	Name						
	Registered address						
	Trading status						
	Company registration number						
	Head Office DUNS number (if applicable)						
	Registered VAT number						
	Type of organisation						
	SME (Yes/No)						

	The role each sub-contractor will take in providing the works and /or supplies e.g. key deliverables					
	The approximate % of contractual obligations assigned to each sub-contractor					

**Contact Details & Declaration**

I declare that to the best of my knowledge the answers submitted and information contained in this document are correct and accurate.

I declare that, upon request and without delay I will provide the certificates or documentary evidence referred to in this document.

I understand that the information will be used in the selection process to assess my organisation’s suitability to be invited to participate further in this procurement.

I understand that the authority may reject this submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section.

I am aware of the consequences of serious misrepresentation.

Section 1	Contact Details & Declaration	
Qu No.	Question	Response
1.3(a)	Contact name:	
1.3(b)	Name of organisation:	
1.3(c)	Role in organisation:	
1.3(d)	Phone number:	
1.3(e)	Email address:	
1.3(f)	Postal address:	
1.3(g)	Signature:	
1.3(h)	Date:	

## Part 2: Exclusion Grounds

Please answer the following questions in full. Note that every organisation that is being relied on to meet the selection must complete and submit the Part 1 and Part 2 self-declaration.

Section 2		Grounds for Mandatory Exclusion
Qu No.	Question	Response
2.1(a)	<p><b>Regulations 57(1) and (2)</b></p> <p>The detailed grounds for mandatory exclusion of an organisation are set out on this <a href="#">webpage</a>, which should be referred to before completing these questions.</p> <p>Please indicate if, within the past five years: you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences within the summary below and listed on the <a href="#">webpage</a>.</p>	
	Participation in a criminal organisation	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Corruption	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Fraud	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Terrorist offences or offences linked to terrorist activities	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Money laundering or terrorist financing	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Child labour and other forms of trafficking in human beings	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
2.1(b)	<p>If you have answered yes to question 2.1(a), please provide further details.</p> <p>Date of conviction, specify which of the grounds listed the conviction was for, and the reasons for conviction, Identity of who has been convicted.</p> <p>If the relevant documentation is available electronically please provide the web address, issuing authority, precise reference of the documents.</p>	
2.2	If you have answered Yes to any of the points above have measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self Cleaning)	Yes <input type="checkbox"/> No <input type="checkbox"/>

2.3(a)	<p><b>Regulation 57(3)</b></p> <p>Has it been established, for your organisation by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which the organisation is established (if outside the UK), that the organisation is in breach of obligations related to the payment of tax or social security contributions?</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
2.3(b)	<p>If you have answered yes to question 2.3(a), please provide further details. Please also confirm you have paid, or have entered into a binding arrangement with a view to paying, the outstanding sum including where applicable any accrued interest and/or fines.</p>	

**NOTE:** The authority reserves the right to use its discretion to exclude a potential supplier where it can demonstrate by any appropriate means that the potential supplier is in breach of its obligations relating to the non-payment of taxes or social security contributions.

<b>Section 3 Grounds for Discretionary Exclusion</b>		
<b>Qu No.</b>	<b>Question</b>	<b>Response</b>
3.1	<p><b>Regulation 57 (8)</b></p> <p>The detailed grounds for discretionary exclusion of an organisation are set out on this <a href="#">webpage</a>, which should be referred to before completing these questions.</p> <p>Please indicate if, within the past three (3) years, anywhere in the world any of the following situations have applied to you, your organisation or any other person who has powers of representation, decision or control in the organisation.</p>	
3.1(a)	Breach of environmental obligations?	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes please provide details at 3.2</p>
3.1(b)	Breach of social obligations?	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes please provide details at 3.2</p>
3.1(c)	Breach of labour law obligations?	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes please provide details at 3.2</p>
3.1(d)	Bankrupt or is the subject of insolvency or winding-up proceedings, where the organisation's assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended or it is in any analogous	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes please provide details at 3.2</p>

	situation arising from a similar procedure under the laws and regulations of any State?	
3.1(e)	Guilty of grave professional misconduct?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(f)	Entered into agreements with other economic operators aimed at distorting competition?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(g)	Aware of any conflict of interest within the meaning of regulation 24 due to the participation in the procurement procedure?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(h)	Been involved in the preparation of the procurement procedure?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(i)	Shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(j)	Please answer the following statements:	
3.1(j) - (i)	The organisation is guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2
3.1(j) - (ii)	The organisation has withheld such information.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2
3.1(j) –(iii)	The organisation is not able to submit supporting documents required under regulation 59 of the Public Contracts Regulations 2015.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2
3.1(j)-(iv)	The organisation has influenced the decision-making process of the contracting authority to obtain confidential information that may confer upon the organisation undue advantages in the procurement procedure, or to negligently provided misleading information that may have a material influence on decisions concerning exclusion, selection or award.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2
3.2	If you have answered Yes to any of the above, explain what measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self Cleaning)	

### Part 3: Selection Questions<sup>5</sup>

Section 4		Economic & Financial Standing	
Pass/Fail	Question	Response	
4.1	Are you able to provide a copy of your audited accounts for the last two years, if requested?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2	Where we have specified a minimum level of economic and financial standing and/or a minimum financial threshold, see below, please self-certify by answering 'Yes' or 'No' that you meet the requirements set out.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<p><b>NOTE:</b> Minimum annual turnover threshold must be per Lot, if you are applying for multiply Lots these figures need to be aggregated together to make the PASS mark:</p> <p><b>Lot 001: £8M</b>  <b>Lot 002: £4M</b>  <b>Lot 003: £2M</b>  <b>Lot 004: £0.5M</b>  <b>Lot 005: £0.2M</b>  <b>Lot 006: £0.1M</b></p>			

Section 5		If you have indicated in the Selection Questionnaire question 1.2 that you are part of a wider group, please provide further details below:	
Name of organisation:			
Relationship to the Supplier completing these questions:			
5.1	Are you able to provide parent company accounts if requested to at a later stage?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
5.2	If yes, would the parent company be willing to provide a guarantee if necessary?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
5.3	If no, would you be able to obtain a guarantee elsewhere (e.g. from a bank)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

<sup>5</sup> [See Action Note 8/16 Updated Standard Selection Questionnaire](#)

Section 6	Technical & Professional Ability
<b>6.1</b>	<p><b>Relevant experience and contract examples</b></p> <p>Please provide details of three (3) contracts, in any combination from either the public or private sector; voluntary, charity or social enterprise (VCSE) that are relevant to our requirement. Contracts for Works contracts should have been performed during the last three (3) years.</p> <p>The named contact provided should be able to provide written evidence to confirm the accuracy of the information provided below.</p> <p>Consortia bids should provide relevant examples of where the consortium has delivered similar requirements. If this is not possible (e.g. the consortium is newly formed or a Special Purpose Vehicle (SPV) is to be created for this contract) then three (3) separate examples should be provided between the principal member(s) of the proposed consortium or SPV (three (3) examples are not required from each member).</p> <p>Where the Supplier is a SPV, or a managing agent not intending to be the main provider of the supplies or services, the information requested should be provided in respect of the main intended provider(s) or sub-contractor(s) who will deliver the contract. These previous contracts ideally will have a mix of industrial and office development, but the office development is critical.</p>

	Contract 1 (6.1a)	Contract 2 (6.1b)	Contract 3 (6.1c)
<b>Name of Customer Organisation:</b>			
<b>Point of Contact in the Organisation:</b>			
<b>Position in the Organisation:</b>			
<b>Email Address:</b>			
<b>Description of Contract:</b>			
<b>Contract Start Date:</b>			
<b>Contract Completion Date/Contract Length:</b>			
<b>Estimated Contract Value:</b>	£	£	£

Section 7 Pass/Fail	Modern Slavery Act 2015: Requirements under Modern Slavery Act 2015	
7.1	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 <input type="checkbox"/> N/A <input type="checkbox"/>
7.2	If you have answered Yes to question 7.1 are you compliant with the annual reporting requirements contained within Section 54 of the Act 2015?	Yes <input type="checkbox"/> Please provide the relevant URL No <input type="checkbox"/> Please provide an explanation
<b>NOTE:</b> 7.2 Only relevant to companies who have a turnover greater than £36M		

### 8. Additional Questions

Suppliers who self-certify that they meet the requirements to these additional questions will be required to provide evidence of this, definitely at contract award stage if not before. Failure to provide the requested self-certification evidence will mean automatic failure and exclusion from all future tenders for a minimum period of three years (up to five).

Section 8 Pass/Fail	Insurance	
8.1	Please self-certify whether you already have, the levels of insurance cover indicated below: <b>Y/N</b> <b>Employer's (Compulsory) Liability Insurance = £10M</b> <b>Public &amp; Product Liability Insurance = £10M</b>	Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/>

Section 9 Pass/Fail	Invoicing	
9.1a	EDI Invoicing Route – You must be able to provide daily (or weekly for Lot 004, 005 and 006) invoice feed(s) which interfaces directly into Open Housing/Open Accounts? [see <b>Appendix 1</b> for further details]	Yes <input type="checkbox"/> No <input type="checkbox"/>
9.1b	If so, please provide details to justify your Yes – testing may be undertaken by either our Finance or IT departments at a later date; if you are unable to provide reassurance and confidence this will be seen as a Fail and you will be failed from the whole process.	

Section 10 Pass/Fail	Deliveries/Ordering [the following are principles which you must be able to offer to be considered for the wider contract – more focus on these within the main body of the tender where evidence will be required]	
10.1a	Can you deliver all planned materials, void packs and equipment, as required dependent on Lot, to site anywhere within out stock area?	Yes <input type="checkbox"/> No <input type="checkbox"/>
10.1b	Lot 1, 2, 3, 4: Do you offer a call centre facility to place orders including van stocks? NB: by call centre this does not have to be a separate location but it cannot just be the service desk/counter – a dedicated facility on-site or off-site must be available for all non-electronic orders between 8-5	Yes <input type="checkbox"/> No <input type="checkbox"/>
10.1c	Can orders be facilitated next working day if placed by 3pm?	Yes <input type="checkbox"/> No <input type="checkbox"/>
10.1d	All agreed prices must be the same wherever they are ordered/collected or bought from?	Yes <input type="checkbox"/> No <input type="checkbox"/>
10.1e	Can you lock down our product catalogue for core agreed items, agreed as part of this process, only those can be bought/delivered (this one can be work in progress if evidence can be provided that it would be working for 1 <sup>st</sup> February 2018 for testing ahead of Go-Live)?	Yes <input type="checkbox"/> No <input type="checkbox"/>
10.1f	Lot 1, 2, 3: You must hold at least 1 version of all our van stock off site (i.e. central distribution hub), can this be done?	Yes <input type="checkbox"/> No <input type="checkbox"/>
10.1g	Will you have space to provide FPC waste management facilities i.e. up to 2 skips at a location(s) within South Worcestershire [not applicable for Lots 4, 5 & 6]	Yes <input type="checkbox"/> No <input type="checkbox"/>
10.1g(i)	You must have at least 2 branches/bases within our core operational area? [not applicable to Lots 4, 5 & 6 for these we require 1] To be clear these need to be fully operational by the start of the contract, deadline 31 <sup>st</sup> March 2018.	Yes <input type="checkbox"/> No <input type="checkbox"/>
10.1g(ii)	If Yes, please provide details of your branches/bases within our current core operational area?	
10.1h(i)	Do you have a Returns/Warranty Policy?	Yes <input type="checkbox"/> No <input type="checkbox"/>
10.1h(ii)	If Yes, please provide a copy of this as evidence?	

Section 11 Pass/Fail	Health & Safety	
11.1	Health and Safety Exemptions: Section 11.3 onwards need not be completed if your organisation meets the criteria identified in 11.1a and/or 11.1b below please provide evidence, if it does please self-certify. <b>11.2a needs to be completed as well</b>	

<p><b>11.1a</b></p>	<p>You have within the last twelve months, successfully met the assessment requirements of a construction-related scheme in registered membership of the Safety Schemes in Procurement (SSIP) forum.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide copy of certificate</p>																																																																								
<p><b>11.1b</b></p>	<p>You hold a UKAS or equivalent, accredited independent third party certificate of compliance with BS OHSAS 18001.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide copy of certificate</p>																																																																								
<p><b>11.2a</b></p>	<p>Provide a summary of your organisation's Health &amp; Safety record over the past three (3) years, including details of any notifiable accidents, prosecutions, or notices issued by the HSE that have occurred during this period?</p> <table border="1" data-bbox="347 696 1407 1469"> <thead> <tr> <th colspan="4" style="text-align: center;"><b>RIDDOR STATISTICS</b></th> </tr> <tr> <th colspan="4" style="text-align: center;">(Reporting of Injuries, Diseases and Dangerous Occurrences Regulations)</th> </tr> <tr> <th style="text-align: center;">YEAR</th> <th style="text-align: center;">2016</th> <th style="text-align: center;">2015</th> <th style="text-align: center;">2014</th> </tr> </thead> <tbody> <tr> <td>Number of employees:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total hours worked (million):</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Fatalities:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Number of major injuries:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Number of other injuries (three (3) days):</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Dangerous occurrences:</td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Prohibition notices:</b></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Improvement notices:</b></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Prosecutions:</b></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>Reportable accidents to RIDDOR:</b></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Fatal injury rate AFR:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Non-fatal major injury rate AFR:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Over three (3) day injury rate AFR:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total accident rate AFR:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Accident incident rate:</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p><b>NOTE:</b> Any HSE Notices which are not declared within the returned table, above, but are shown on the HSE website will mean automatic failure. Further evidence may be sort in relation to HSE Notices.</p> <p style="text-align: center;"><b>Numbers should include – Staff/Direct Employees</b></p> <p><b>AFR:</b> Number of Accidents per 100,000 hours worked.</p> <p><b>Accident Incident Rate:</b> Number of Accidents per 100,000 Employees.</p> <p><b>Reportable Injury:</b> Major Injury (Hospitalisation for 24 hours or more).</p> <p><b>Other:</b> More than three (3) days off work, not including the day of the accident.</p>		<b>RIDDOR STATISTICS</b>				(Reporting of Injuries, Diseases and Dangerous Occurrences Regulations)				YEAR	2016	2015	2014	Number of employees:				Total hours worked (million):				Fatalities:				Number of major injuries:				Number of other injuries (three (3) days):				Dangerous occurrences:				<b>Prohibition notices:</b>				<b>Improvement notices:</b>				<b>Prosecutions:</b>				<b>Reportable accidents to RIDDOR:</b>				Fatal injury rate AFR:				Non-fatal major injury rate AFR:				Over three (3) day injury rate AFR:				Total accident rate AFR:				Accident incident rate:			
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<p>11.2b</p>	<p>If you have declared more than one (1) HSE Prohibition or Improvement Notice over the last three (3) years please provide details on how you dealt with these notices and what changes have you made to policy/practice to avoid this ever happening again?</p> <p><b>NOTE:</b> Repeat patterns of Notices will lead to automatic failure.</p>																																																																									

Only answer all below if you are unable to prove certification at 11.1a or b			
11.3	Are you able to demonstrate that you have a policy for organisational-wide health and safety (H&S) management?	Please provide evidence of a periodically reviewed H&S policy, endorsed by the Chief Executive or equivalent and regularly reviewed at a senior management level. The policy should be relevant to the anticipated nature and scale of activity to be undertaken and set out responsibilities for H&S management at all levels in the organisation. <i>(Organisations with fewer than 5 employees, see note (i) in Appendix B)</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
11.4	Are you able to describe your arrangements for ensuring that your H&S measures are effective in reducing/preventing incidents, occupational ill-health and accidents?	Please provide details of the arrangements for H&S management that are relevant to the anticipated nature and scale of activity to be undertaken and show clearly how these arrangements are communicated to the workforce. <i>(Organisations with fewer than 5 employees, see note (i) in Appendix B)</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
11.5	Do you have access to competent H&S advice/assistance – both general and construction/sector related?	Please provide evidence of how your organisation obtains access to competent H&S advice.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>NOTE:</b> Access to competent in-house advice, in whole/part, is preferred. It is essential that H&amp;S Advisor(s) are able to provide general H&amp;S advice and that (from the same source or elsewhere) advice relating to construction H&amp;S issues is accessible as required.</p>			
11.6	Do you have a policy and process for providing your staff/workforce with training and information appropriate to the types of activity that your organisation is likely to undertake?	Provide evidence that your organisation has in place and implements, training arrangements to ensure that its staff/ workforce has sufficient skills and understanding to discharge their various duties. This should include refresher training (e.g. a CPD programme) that will keep the workforce updated on good H&S practice applicable throughout the company. By types of activity we mean core and specialist work areas.	<input type="checkbox"/> Yes <input type="checkbox"/> No
11.7	Does your staff/	You will be expected to demonstrate and provide evidence on request, that your staff/workforce possess suitable qualifications	<input type="checkbox"/> Yes <input type="checkbox"/> No

	workforce have H&S or other relevant qualifications and experience sufficient to implement your H&S policy to a standard appropriate to the activity that your organisation is likely to undertake.	and experience for the tasks assigned to them, unless there are specific situations where they need to work under controlled and competent supervision e.g. trainees.	
11.8	Do you check, review and where necessary improve your H&S performance?	Please provide evidence that your organisation has in place and implements, an ongoing system for monitoring H&S procedures on an ongoing basis and for periodically reviewing and updating that system as necessary.	<input type="checkbox"/> Yes <input type="checkbox"/> No
11.9	Do you have procedures in place to involve your staff/workforce in the planning and implementation of H&S measures?	Please provide evidence that your organisation has in place and implements a means of consulting with its staff/workforce on H&S matters and show how staff/workforce comments, including complaints are taken into account and actioned if appropriate?	<input type="checkbox"/> Yes <input type="checkbox"/> No
11.10	Do you routinely record and review accidents/incidents and undertake follow-up action?	Please provide access to records of accident rates and frequency for all RIDDOR reportable (see note (ii) in Appendix B) - events for at least the last three (3) years. Demonstrate that your organisation has in place a system for reviewing significant incidents, and recording action taken as a result including action taken in response to any enforcement.	<input type="checkbox"/> Yes <input type="checkbox"/> No
11.11	Do you have arrangements for ensuring that your suppliers apply H&S measures to a standard appropriate to the activity for which they are being engaged?	You will be expected to demonstrate and provide evidence on request, that your organisation has and implements, arrangements for ensuring that H&S performance throughout the whole of your organisation's supply chain is appropriate to the work likely to be undertaken.	<input type="checkbox"/> Yes <input type="checkbox"/> No
11.12	Do you operate a process of risk assessment capable of	You will be expected to demonstrate and provide evidence on request that your organisation has in place and implements procedures for carrying out relevant risk	<input type="checkbox"/> Yes <input type="checkbox"/> No

	supporting safe methods of work and reliable project delivery where necessary (including site deliveries)?	assessments and for developing and implementing safe systems of work ('method statements'). You should be able to provide indicative, but relevant examples. The identification and control of any significant occupational health (not just safety) issues should be prominent.	
<p><b>NOTE</b> Risk assessments should focus on the needs of the particular job and should be proportionate to the risks arising from the work to be undertaken. In addition to ensuring risk management, the need to reduce documentary requirements on micro-businesses in particular should be taken into account by buyers and assessment providers. Excessive bureaucracy associated with competency assessment can obscure the real risk issues and divert effort away from them.</p>			
11.13	Do you have arrangements for co-operating and co-ordinating your work with others (including other suppliers, notably contractors)?	Please provide explanation of how co-operation and co-ordination of the work is achieved in practice, and how other organisations are involved in drawing up method statements/safe systems of work etc. including arrangements for response to emergency situations. This should include details of how comments and input from your suppliers will be taken into account and how external comments including any complaints, will be responded to.	<input type="checkbox"/> Yes <input type="checkbox"/> No
11.14	Do you have arrangements for ensuring that on-site welfare provision meets legal requirements and the needs/expectations of your employees?	You will be expected to demonstrate and provide evidence on request about how you ensure suitable welfare facilities will be in place before starting work on site, whether provided by a site-specific arrangement or your own organisational measures.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>NOTE:</b> Please provide reference to any supporting documents for any of the above answers.</p>			

<b>Section 12</b>	Environment	
<b>Pass/Fail</b>		
12.1a	<p>Environment Exemption: Section 10 need not be completed if your organisation holds a UKAS (or equivalent) accredited independent third party certificate of compliance with BS EN ISO 14001 or a valid EMAS certificate, and can provide the supporting evidence requested. (See EMAS note in Appendix B)</p>	<p>Exemption claimed  <input type="checkbox"/> Yes  <input type="checkbox"/> No            If yes, please provide copy of certificate</p>

12.1b	Full Chain of Custody [Lot 1 only]: Does all of your wood come from approved source(s) either approved by the FSC (Forest Stewardship Council) or PEFC (Programme for the Endorsement of Forest Certification)?		<input type="checkbox"/> Yes <input type="checkbox"/> No
<b><i>Only answer if you are unable to prove certification at 12.1</i></b>			
12.2	Do you have a documented policy and organisation for the management of construction-related environmental issues?	Please provide evidence that you or your organisation has an environmental management policy authorised by the Chief Executive or equivalent and regularly at a senior management level. The policy should be relevant to the nature and scale of the activity and set out the responsibilities for environmental management throughout the organisation	<input type="checkbox"/> Yes <input type="checkbox"/> No
12.3	Do you have documented arrangements for ensuring that your environmental management procedures are effective in reducing/preventing significant impacts on the environment?	Please provide evidence that your organisation's environmental policy implementation plan provides information as to how the company aims to discharge relevant legal responsibilities and provides clear indication of how these arrangements are communicated to the workforce, in relation to environmental matters including: <ul style="list-style-type: none"> <li>• sustainable materials procurement;</li> <li>• waste management;</li> <li>• energy management.</li> </ul> This should include the arrangements for responding to, monitoring and recording environmental incidents and emergencies and complaints.	<input type="checkbox"/> Yes <input type="checkbox"/> No
12.4	Do you have arrangements for providing employees who will engage in construction, with training and information on construction related environmental issues?	Please provide evidence that your organisation has in place and implements, training arrangements to ensure that its workforce has sufficient skills and understanding to carry out their various duties. This should include a programme of refresher training that will keep the workforce updated on relevant legal requirements and good environmental management practice.	<input type="checkbox"/> Yes <input type="checkbox"/> No
12.5	Do you check, review and where necessary improve your environmental	Please provide evidence that your organisation has a system for monitoring environmental management procedures on an ongoing basis and for updating them at periodic interval.	<input type="checkbox"/> Yes <input type="checkbox"/> No

	management performance?		
12.6	Do you have arrangements for ensuring that any suppliers you engage apply environmental protection measures that are appropriate to the activity for which they are being engaged.	Please provide evidence that your organisation has procedures for monitoring supplier's environmental management arrangements and ensuring that environmental performance appropriate for the activity to be undertaken is delivered throughout the whole of your organisations supply chain.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>NOTE:</b> Please provide reference to any supporting documents for any of the above answers.			

<b>Section 13</b>	<b>Quality Management Policy &amp; Capability</b>		
<b>Pass/Fail</b>			
13.1	Quality Exemption: Section 11 need not be completed if your organisation holds a UKAS (or equivalent) accredited independent third party certificate of compliance with BS EN ISO 9001 and can provide the supporting evidence requested.		Exemption claimed <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide copy of certificate
<b>Only answer if you are unable to prove certification at 13.1</b>			
13.2	Do you have a policy for organisational-wide quality management?	Please provide evidence that your organisation has and implements a quality management policy that is authorised by the Chief Executive or equivalent and periodically reviewed at a senior management level. The policy should be relevant to the nature and scale of the work to be undertaken and set out responsibilities for quality management throughout the organisation.	<input type="checkbox"/> Yes <input type="checkbox"/> No
13.3	Do you have arrangements for ensuring that your quality management, including the quality of construction output and	Please provide evidence that your organisation keeps copies of documentation setting out quality management organisation and procedures that meet currently agreed good practice. These should include the arrangements for quality management throughout the organisation. They should set out how the company will carry out its policy, with a clear indication of how the arrangements are communicated to the workforce.	<input type="checkbox"/> Yes <input type="checkbox"/> No

	<p>general performance, is effective in reducing/preventing incidents of sub-standard delivery?</p>		
13.4	<p>Do you have arrangements for providing your workforce with quality-related training and information appropriate to the type of work for which your organisation is likely to bid?</p>	<p>Please provide evidence that your organisation has in place and implements, training arrangements to ensure that its workforce has sufficient skills and understanding to discharge their various responsibilities as would be required under this development project. These arrangements should include a programme of training that will keep the workforce up to date with required knowledge about quality related issues, including copies of job profiles; training manuals and training records.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
13.5	<p>Do you have procedures for periodically reviewing, correcting and improving quality performance?</p>	<p>Please provide evidence that your organisation has a system for monitoring quality management procedures on an on-going basis. Your organisation should be able to provide evidence of systematic, periodic review and improvement of quality in respect of construction output and general performance.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
13.6	<p>Do you have arrangements for ensuring that your own suppliers and key supply chain partners apply quality management measures that are appropriate to the work for which they are being engaged?</p>	<p>Please provide evidence that your organisation has arrangements for monitoring supplier's quality management arrangements and ensuring that quality performance appropriate for the work to be undertaken is delivered throughout the whole of your organisations supply chain, especially your key proposed sub-contractors</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>

**NOTE:** Please provide reference to any supporting documents for any of the above answers.

<b>Section 14 Pass/Fail</b>	<b>Equality</b>	
14.1	Is it your policy as an employer to comply with your statutory obligations to staff and applicants for employment under equality legislation, including the Equality Act 2010 and regulations made under that Act?	<input type="checkbox"/> Yes <input type="checkbox"/> No
14.2	Does your organisation have a formal Equality & Diversity policy or equivalent? (self certification)	<input type="checkbox"/> Yes <input type="checkbox"/> No
14.3	<p>Does the policy address the following?</p> <p>(a) Recruitment, selection, training, promotion, discipline and dismissal?</p> <p>(b) Discrimination, harassment, and victimisation (and it is made clear that these are disciplinary offences within the organisation)?</p> <p>(c) Identification of the senior position with responsibility for the policy and its effective implementation?</p> <p>(d) How the policy is communicated to staff?</p> <p>(e) It covers both employees and service users?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
14.4	<p>Is your policy effectively implemented in the organisation's recruitment practices, including open recruitment methods such as the use of:</p> <p>(a) Job centres</p> <p>(b) Careers service</p> <p>(c) Press advertisements</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
14.5	<p>Does your organisation monitor the profile of its staff according to the following 'protected characteristics' as laid down within the Equalities Act 2010?</p> <p>(a) Age</p> <p>(b) Sex (Gender)</p> <p>(c) Disability</p> <p>(d) Race (Ethnicity)</p> <p>(e) Sexual Orientation</p> <p>(f) Religion and Belief</p> <p>(g) Gender Reassignment</p> <p>(h) Marriage &amp; Civil Partnership</p> <p>(i) Pregnancy &amp; Maternity</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
14.6	Does your organisation provide equality training for managers and any staff responsible for recruitment and selection?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Section 15 Pass/Fail	Business Continuity	
15.1	Which of the following Business Continuity documents does your organisation maintain? (Please attach any documents to your submission), one required as a minimum:  (a) Business Continuity Policy (b) Business Continuity Plan (c) Disaster Recovery Plan	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No
15.2	When was your Business Continuity Plan last reviewed?	
15.3	When was your Business Continuity Plan last tested?	
15.4	What procedure do you have in place if your central distribution centre and/or ordering call centre was to go off line, for whatever reason, for more than 4 hours? Please describe the process to give FPC reassurance [Scored Question].	

Declaration	
	<p>I declare that to the best of my knowledge the answers submitted in this SQ are correct. I understand that the information will be used in the process to assess my organisation's suitability to be invited to tender for FPC's requirement and I am signing on behalf of my organisation. I understand that FPC may reject this SQ if there is a failure to answer all relevant questions fully or if I provide false/misleading information, and are duly aware of the consequences of my actions of providing false/misleading information.</p>
	<b>FORM COMPLETED BY:</b>
	Name: <input type="text"/>
	Position: <input type="text"/>
	Date: <input type="text"/>
	Signature: <input type="text"/>
	Telephone Number: <input type="text"/>
	Email Address: <input type="text"/>

## Appendix A

### SQ EVALUATION AND SCORING GUIDE

**Failure to complete any part of the questionnaire will result in your application being disqualified, this will be the first check, and it is your responsibility to make sure every appropriate question is answered.**

#### DEFINITION

**PASS** - All answers are in lines with the requirements set below and the Evaluation Panel, having reviewed the supporting information, has decided the Applicant can proceed to the next stage of the process. Please be clear that this will be based largely upon self-certified responses and if at a latest stage it is proved that the Applicant misrepresented or lied in the original submission, your tender will automatically fail and FPC reserves the right to take this class further.

**FAIL** – One or more answers fail the set standards below, the Evaluation Panel having reviewed the supporting information, does not wish the Applicant to progress further in the process because they believe they are not compliant.

Criteria	Score
<b>Exceptional</b> Demonstrates strengths, no errors, weaknesses or omissions and exceeds expectations in some or all respects.	<b>10</b>
<b>Good</b> The standard of evidence fully meets expectations.	<b>8</b>
<b>Satisfactory</b> The evidence is acceptable but with some minor reservations.	<b>6</b>
<b>Doubtful</b> The evidence is in part acceptable but with some major reservations.	<b>4</b>
<b>Poor</b> The evidence is deficient in certain areas where the details of relevant evidence require the reviewer to make large assumptions.	<b>2</b>
<b>Rejected</b> Evidence is unacceptable or non-existent, or there is a failure to properly address any issue.	<b>Fail (0)</b>

## **Appendix B**

### **NOTES**

#### **Health & Safety**

(i) Organisations with fewer than five (5) employees are not legally required to have a documented policy statement. If a supplier is in this category it does not have to write down its policy, organisation or arrangements. However, it does need to be able to demonstrate that its policy and arrangements are adequate in relation to the type of activity likely to be undertaken and assessments of competence will be made easier if when procedures are clear and accessible.

(ii) RIDDOR: The Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995.

(iii) The terms 'Principal Designer' (for CDM purposes) relate to the professional function to be provided by the supplier, not to the type of organisation. These questions align with the latest requirements as lead down in the Construction (Design & Management) Regulations 2015 (CDM 2015).

(iv) Chartered membership of a recognised construction-related institution.

#### **Environment**

EMAS: The European Eco-management and Audit Scheme, sponsored by the European Commission (see [http://ec.europa.eu/environment/emas/index\\_EN.htm](http://ec.europa.eu/environment/emas/index_EN.htm))

#### **Building Information Modelling, Policy & Capability**

Level 2 BIM describes a specific range of BIM capabilities (see PAS 1192-2:2013). These involve developing and sharing 3D construction project-related data, via an electronic 'BIM environment', with others involved in a project. This includes an as-built 'Data Drop' for use by the Client. The electronic BIM environment allows design models (digital objects and supporting information about these objects) to be shared. Each model requires platform software and a database of object information.

**FAILURE TO PASS STANDARD SELECTION QUESTIONNAIRE (SQ) SECTION WILL MEAN AUTOMATIC FAILURE AND FPC WILL NOT SCORE YOUR INFORMATION TO TENDER SUBMISSION.**

**WE WOULD STRONGLY SUGGEST THAT IF YOU CANNOT EVIDENCE (EVEN IF IT HAS NOT BEEN REQUESTED AT THIS STAGE) ANY ANSWERS WITHIN THE SQ THEN YOU SHOULD FILL OUT THE ITT SECTION, ULTIMATELY WASTING BOTH OUR AND YOUR TIME**

### SECTION 3: INFORMATION TO TENDER (ITT)

This ITT is for only those suppliers who have fully passed the SQ section of this tender. If you have failed any question within the SQ (pre-qualification section), FPC will not look at your submitted ITT. If you have not met the minimum standards or believe you have not achieved the level of reassurance required in the areas which FPC will be focusing upon i.e. EDI, deliveries, you will be automatically disqualified and your ITT submission will not even be looked at, so our advice is to not even fill out this section.

If your pre-qualification document has passed all areas, the evaluation panel, which is the Materials Working Group, see below, will assess your ITT submission.

Materials Working Group consists of the following members (not all members will score all questions all will be based off an average scoring approach):

- Bill Tebay – FPC Managing Director
- Marc Mayall – FPC General Manager
- Richard Orders – Group Procurement Manager
- Pete Cresswell – FPC Operations Manager
- Lee Vernalls – Contracts Supervisor (Responsive & Voids)
- Andy Bassett – Mechanical Services Manager (Gas & Electrical)
- Louie Nesbitt – Investment Quantity Surveyor
- Chris Morris – Partnership Executive
- Maxine Titley – FPC Finance Manager

This ITT is based around a number of key documents:

- **Contract** (entitled: *Contract Agreement for the Supply & Distribution of Materials & Performance of Services*, attached as a standalone document to this tender) – you must submit any queries you have with the contract as part of your tender submission. If you are chosen as the preferred bidder(s) and you have not submitted any queries to the Contract, FPC will take this as complete acceptance of the Contract and you will not be given any chance to change. Any queries raised will be assessed as part of the tender evaluation process so expect clarification from a Panel Member or our solicitor (Trowers & Hamblins). We have developed a contract which we believe is fair to all parties and can assist this partnership moving forward.
- **Pricing Documents**, see attached – consisting of various sections (see attached cost models **Appendix 7-19**), high level these can be split into three:

1. Major component parts (including heating packs, kitchens)
  2. Van stocks (including electrical, gas servicing, plumbing)
  3. Void pack
- **Quality/Service Questions**, see below – a number of questions on your proposed service offering and contract management must be answered these will form the Quality/Service marks which go forward to the overall score (to assist with this a list of FPC expectations have been created)

## TENDER SCORING

### Overall Tender Split:

- **Price 70%** (each Lot will be individually let, based off the MEAT criteria stated here within, equality and fairness will underpin the scoring process and ultimate award per lot. As previously stated supplier can go for as many Lots as they wish and may win more than one)
- **Quality/Service 30%** (one submission required per entry, if you are submitting for more than one lot your answer needs to reflect this please make it clear which lot your submission relates to). In the main your submissions should be generic across all lots except for any special service offerings i.e. relating to Power Tools or Equipment Hire.

**Appendix 20** has been developed to provide you with the majority of items of 2016/17 expenditure, mainly relating to Lots 1 & 2. We believe we have included all the main, commonly used items within the attached Cost Models, but please be aware that we may have missed something. Before the contract commences in April 2018 we will analyse again to see if there is anything requiring including and get this agreed.

Which pricing documents you must submit depend on which Lot(s) you are tendering for, please only submit a response for those marked with a cross (X), if you feel you should be submitted against a Cost Model under a Lot which has not been marked please let us know as soon as possible:

Cost Models [attachment number]	Lot 1	Lot 2	Lot 3	Lot 4	Lot 5	Lot 6
<b>Van Stocks</b>						
<b>Gas Servicing</b> [#10]		X				
<b>Electrics</b> [#7]			X			
<b>Plumbing</b> [#9]		X				
<b>Carpentry</b> [#8]	X					
<b>Wet Trades</b> [#11]	X					
<b>Voids</b>						

Void Packs [#19]	X					
<b>Major Components</b>						
Kitchens & Additional Items [#15]	X					
Bathroom & Additional Items [#16]		X				
Heating [#18]		X				
<b>Other Cost Models</b>						
Roofing Packs [#14]				X		
Equipment Hire [#13]					X	
Tools/Power Tools [#12]						X

**Table 5:** Cost Models relating to with Lots

Scoring Cost Models [attachment no.]	Lot 1	Lot 2	Lot 3	Lot 4	Lot 5	Lot 6
<b>Van Stocks</b>						
Gas Servicing [#10]		30%				
Electrics [#7]			100%			
Plumbing [#9]		20%				
Carpentry [#8]	40%					
<b>Voids</b>						
Void Packs [#19]	30%					
<b>Major Components</b>						
Kitchens & Additional Items [#15]	30%					
Bathroom & Additional Items [#16]		20%				
Heating [#18]		30%				
<b>Other Cost Models</b>						
Roofing Packs [#14]				100%		
Equipment Hire [#13]					100%	
Tools/Power Tools [#12]						100%
<b>TOTALS</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

**Table 6:** Lots scoring against appropriate Cost Models

## TENDER PROCESS/OBLIGATIONS

1. FPC will be following an Open Procedure through the Official Journal of the European Union (OJEU). There is only one stage to the process, and all applicants expressing interest in response to the Contract Notice will be invited to submit a tender subject to successfully passing the SQ section first.
2. By participating in this tender you are indicating your acceptance to be bound by the guidelines set.
3. To simplify exchange of information regarding this Invitation to Tender (ITT) please nominate a Bid Manager and relevant contact telephone number and email address.
4. Please direct any questions/queries regarding the ITT content or process to Richard Orders, Procurement Manager ([rorders@fortisliving.com](mailto:rorders@fortisliving.com)). You should not contact other FPC/Fortis personnel unless directed to do so.
5. FPC reserves the right to disqualify and reject proposals from providers who do not comply with these guidelines or the minimum standards laid out within.
6. All questions must be submitted in writing, via email.
7. Following the submission deadline, tenders will be evaluated by a scoring team comprising of the Materials Working Group, see full list on page 40.
8. As part of this tender process FPC makes no obligations in any way to:
  - a. Pay any bidder for any ITT response, or
  - b. Award the contract to the lowest or any bidder, or
  - c. Accept any ITT information received from a bidder, or
  - d. Any other commitments to bidders whatsoever.
9. Only those meeting FPC's minimum criteria and requirements, will be eligible to have their tender assessed as set out below.
10. Tender return must include at least 2 written and 1 electronic copy (CD, Pen Drive etc)
11. Please deliver the written response(s) and electronic copy to Richard Orders, Procurement Manager in the tender envelope provided with no marks to identify your company by **13:00 on Monday 23<sup>rd</sup> October 2017**, to:  
**Company Secretary, (c/o Richard Orders), Fortis Property Care,  
Festival House, Grovewood Road, Malvern WR14 1GD.**
12. Tenders can be either sent through the post to the above address or hand delivered to Fortis Living's Reception at Festival House. To assist with the evaluation process it would be very useful if you could email your submitted cost models to [rorders@fortisliving.com](mailto:rorders@fortisliving.com) on the day of submission.
13. Tenders are deemed to be valid and remain open for acceptance until the 31<sup>st</sup> March 2018, all prices once submitted will have no movement until the end of the first full year or as defined within the Contract Document (Clause 8 & 9).
14. FPC reserves the right to disregard any non-compliant, late or incomplete responses.

15. FPC reserves the right not to accept any of the tenders submitted, nor the lowest priced tender or to be responsible for any costs incurred in preparing a tender.
16. You will be required to submit a written proposal as part of the response in the form set out that will enable us to evaluate your ability to provide the merchant service(s). Your Bid Manager/Director should sign all responses. The sections must use the same paragraph numbering system as this ITT and should specifically address all sections.
17. The following documents **must** be completed and returned with the tender submission, subject to the Lot(s) you are tendering for:
  - a. Section 1 – Table of Lots (which Lot(s) are you tendering for)
  - b. Section 2 – SQ Document
  - c. Section 3 – Quality/Service answers, Learning & Skills Table and Form of Tender (page 54)
  - d. Cost Models as required (see table on page 41 for help)
  - e. Appendix 1 and 2 (completed and signed)
18. Certificate of Non-Collusion (**Appendix 1**)
19. Declaration Form (**Appendix 2**)
20. You are expected to supply all required information, or clearly state the reason for being unable to do so. Any assumptions used in preparing responses should be clearly stated. Any appropriate supporting documents e.g.; brochures, organisation charts, systems solutions etc. should be included and clearly marked.
21. All tenders must be entered in a plain envelope and have a Tender Document Label attached to the front (you will find the required Label in your Invitation To Tender pack). Please respond with **two written** submissions (both Financial and Non-Financial Submissions) and **one electric**, within the same envelope.
22. Questions relating to clarification of the ITT will only be accepted in writing to the FPC representative(s). Likewise, all responses from FPC will be written and made available to other tenderers (subject to confidentiality). In the event that any answer materially affects the ITT specifications, an amendment to the original requirement will be escalated to all tenderers, within two working days. FPC will attempt to answer any question within two working days of receipt of that request; otherwise we will respond within that timescale notifying you of the estimated time to obtain the information.
23. FPC reserves the right to modify the provisions of this ITT at any time prior to the scheduled date for written responses. Additional scope and requirements can be added. Notification of such changes will be provided to all bidders.
24. Should you wish to propose a deviation from the specification please ensure that you clearly identify and highlight where appropriate in your response.

25. FPC will endeavour to adjudicate tenders received and inform tenderers of the result within the timetable laid out in Section 1 above.
26. All submitted prices must include all costs i.e. material product cost, service delivery mark-up and profit.
27. Once Tenders have been received they will be opened and recorded in line with Fortis Living's Standing Orders/Financial Regulations.
28. Tenders will be evaluated by the selection panel and the contract awarded to that offering the **Most Economically Advantageous Tender (MEAT)**, in line with the contract award criteria, defined below.

**NB: Clarifications will be held via email/phone (everything will be confirmed via email post phone call) no clarification meetings (interviews) are planned for this procurement. Post submission of your tender we will expect to visit one of your reference sites as submitted in your SQ submission above. This reference site must be running a delivery and/or van stock model, preferably both, must be within 120 miles (approximate) radius of Worcester and we must be able to visit to meet your client and visit the distribution operation w/c 6<sup>th</sup> November.**

**The Site/Reference Visit will be used if required to rescore your written Quality/Service questions especially around your delivery/van stock replenishment models. Each original scorer will be given their scoring sheet(s) and will be asked to reassess if that person believes their score should be rescored up or down.**

## **TENDER ASSESSMENTS**

### **Initial Screening Assessment**

Following the submission deadline, each submitted tender will be subject to an initial screening assessment to confirm that the tender has been submitted on time, is complete and complies with the requirement of this Invitation to Tender including passing the Pass/Fail thresholds held within the Standard Selection Questionnaire (SQ) document. Tenders that are not complete, nor are compliant with the requirements or have failed any section of the SQ will be rejected at this stage and tenders that successfully pass through the initial screening assessment will be subject to a minimum criteria assessment.

### **Minimum Criteria Assessment**

Under the automatic exclusion criteria as stated within the Public Contracts Regulations 2015, Fortis will automatically fail any bidder who fails to obligate by any of the requirements lay down within Regulations 57, 58, 59 and 60.

There are a number of other criteria which must be satisfied in order for an applicant to be eligible to proceed to the capability/quality evaluation stage. The minimum standards, as described below, will be evaluated first and scored on a pass/fail basis in-line with the requirements set out.

You must provide the following information and documentation within your tender submission:

- Fully completed SQ Section with all requested evidence (i.e. policies, certificates etc) and supporting information.
- Cost Matrix(s), submit as many as are appropriate against the Lot(s) you are tendering for.
- Quality/Service questions – answer all questions as fully as you wish as appropriate to the Lot(s) you are submitting for.
- Signed forms as follows:
  - Certificate of Non-Collusion (**Appendix 1**)
  - Declaration Form (**Appendix 2**)

### **Evaluation of Tenders**

A set of detailed evaluation criteria has been prepared by FPC, your answers to the below will help FPC understand your organisation’s capabilities and the advantages offered by you compared to the market. Please ensure that any documents are clearly referenced to the question(s) to which they refer.

When responding please ensure that the question number and content are clearly set out in your response so that it is clear which question you are responding to.

Within each stage an initial evaluation will consider whether or not every instruction and requirement contained within the ITT has been fulfilled.

FPC’s choice of merchant(s) will be made on the basis of the Most Economically Advantageous Tender (MEAT) and we will assess economic advantageousness having regard to the criteria set out below.

Quality/Service questions attract a maximum of **30%** of the available score and price scores attract a maximum **70%** (total 100%). The weighting of each individual quality question and the weighting of the price score is set out below.

<b>Category</b>	<b>Weighting</b>
<b>Quality</b>	<b>30%</b>
<b>Price</b>	<b>70%</b>
<b>Total</b>	<b>100%</b>

**Scoring Methodology**

**Quality/Service Scores**

Responses to each of the written tender questions will be scored out of a maximum of 10 marks, using a standard method of scoring as set out in the table below:

<b>Assessment</b>	<b>Score</b>	<b>Judgement/Criteria for assessment of answer</b>
Exceptional	10	Demonstrates strengths, no errors, weaknesses or omissions and exceeds expectations in some or all respects.
Good	7-9	The standard of proposals fully meets expectations.
Satisfactory	4-6	The proposals are acceptable but with some minor reservations.
Poor	1-3	The proposals are deficient in certain areas where the details of relevant proposal require the reviewer to make assumptions.
Unacceptable [FAIL]	0	Proposals are unacceptable or non-existent or there is a failure to properly address any issues.

Each scored question will then have a weighting applied (the weightings are shown against each question in the tender, page 46).

**A) Example** for a question scoring 6 out of 10 with a weighting of [2%].

- $(6/10) \times 2 = 1.2\%$  of total score available

The written submissions will be reviewed and scored by members of the scoring team. The same assessors will score each set of written submissions to ensure total consistency.

The scores for each quality question will then be averaged to give the overall quality scores to go forward into the overall scoring matrix.

Each Lot will be scored independently out of 70% on Price and 30% on Quality/Service, ultimately an award will be issued per Lot.

**Price Scores**

Each tenderer will receive a score against the appropriate Lot price, which shall be calculated by reference to the lowest total appropriate Lot price submitted. The lowest tendered Lot total will receive a score of 70. The remaining tenders will then be scored on a standard deviation approach, based upon the difference between their tender and the lowest tender.

**A)** *Example: if the lowest tenderer bids [a price of £20,000] and another tenderer bids £25,000 then the £20,000 bid will receive a score of 70 out of 70. The score for the £25,000 bid, being 25% higher than the lowest tender, will reduce by 25%, therefore receiving a score of 45 out of 70.*

When scoring the tenders, if FPC consider that a tendered value is abnormally low, FPC will seek an explanation or further breakdown from the tenderer, in accordance with Regulation 69 (1) – (3) of the Public Contracts Regulations 2015. If the tenderer is able to satisfy Fortis that it can provide the services for the price tendered then the price will be benchmarked as set out above. However, if the tenderer cannot satisfy FPC that it can provide the services for the price tendered, it will be awarded the maximum 70 marks but the next lowest (excepted) priced tender, will also score 70, the standard deviation process will commence from this next lowest priced tender. FPC, in its discretion, may reject the tender in accordance with Regulation 69 (4) – (7) of the Public Contracts Regulations.

The remainder of the tenders, higher than the benchmark tender will then be scored in respect of their deviation from the benchmark tender in the same way as described above.

**B)** *Example: where Tenderer 1 is considered to have submitted a tender, which FPC considers to be abnormally low such that the services cannot be delivered, then scoring would be as follows:*

	<b>Tenderer 1</b>	<b>Tenderer 2</b>	<b>Tenderer 3</b>	<b>Tenderer 4</b>
Basket Value	£50,000	£100,000	£110,000	£120,000
Score	10	10	9	8

*Tenderer 1: price deemed to be unrealistic and/or unsustainable so scores 10.*

*Tenderer 2: price deemed to be benchmark for scoring and scores 10.*

*Tenderer 3: the value is 10% higher than the benchmark value and therefore tenderer 3's score is 10 less (10 x 10% [1]) = 9*

*Tenderer 4: the value is 20% higher than the benchmark value and therefore tenderer 4's score is 10 less (10 x 20% [2]) = 8*

During the evaluation of pricing submissions, tenderers may be required to clarify aspects of their submission in order to ensure that they have understood the specification requirements. Tenderers will be contacted individually regarding any such clarifications. Please note that the deadlines for clarification responses may be short, but must be met in order that pricing submissions can be included within the overall evaluation process.

### **Instructions**

- All prices shall be deemed to be exclusive of VAT but inclusive of any product/manufacturer rebates.
- We expect you to price each product up to twice, one on a like for like basis, see next bullet point and an equivalent which could be a branded item. If you require to enter a product description of your proposed alternative please add this in the column provided, no column no option to provide an alternative.
- We appreciate that some of the products listed are 'Trade own' ones, for these please enter your closest appropriate product, be that 'Trade own' or 'branded'. All alternative products should be branded ones and we would expect you to price against that product or equivalent.
- For scoring purposes only the first product (Product A) will be included within the overall scoring. All products will be assessed and clarification may be sort on any. FPC reserves the right to change this guidelines if Product A is a 'Trade Only' product and Merchant A is not able to price like for like on a trade only but provides a branded product which meets or outperforms Product A, including meeting our specification, any required British/European Standard(s); this product will be substituted in its place.
- Within the attached Cost Models, please complete all that is appropriate to the Lot(s) you are submitting for, enter your best possible rate per item. We have provided information in Section 1 around expected numbers over the next 3 years and indicative quantities used over the past year (or typical number used on a common programmed upgrade i.e. roof)

*By submitting a response, you are committing to an agreement that you understand the requirement and have sufficiently addressed all aspects of the tender and information contained within the data and that you have checked all stated details, such as prices, to be correct and as intended. The price which is evaluated and approved for scoring will be that price used for at least the first contracted year. All prices must be held for the first year and then only increased with agreement as explained within the Contract, unless the Contract states otherwise i.e. with commodity market items where the market is changing regularly.*

## **NON-FINANCIAL QUESTIONS**

### **Quality/Service Questions (total 30% as split across the following sections)**

Your proposal must include the answer to the following 3 questions:

1. Modernising the Service
2. Contract Management
3. Social Value

NB: Please keep your written submission to a maximum of 15 A4 pages in standard size 11 font.

#### **Quality/Service Section, including scored questions**

The following questions must be answered as part of your overall submission, if you are submitting to win more than one Lot please only submit one answer but make it relevant to the different Lots you are tendering for:

##### **1. Modernising The Service (weighting – 70%)**

Please describe in detail how you will implement and manage our service focusing on the following elements and thinking about the current economy environment and challenges FPC faces. The below points are merely as guidance, as for some of the Lots not all of these will be appropriate:

- a. Delivery models
- b. Ordering procedures
- c. Van stock management/replenishment
- d. Systems integration i.e. EDI invoicing, mobile working
- e. Waste management options
- f. Credits>Returns Procedure

**NB:** We are looking for you to commit to a delivery/management/replenishment model, whatever is proposed, and if successful will form part of the contract. Detail is critical, current relevant experience would hugely assist with how your proposal will work in practice for FPC, with potential examples of how it has worked/working elsewhere and what improvements have been delivered to the Client in terms of service improvements and cost reductions.

**As part of your response please answer this question focusing on how you will maximise the productivity of our operative; you may wish to answer it using a flow chart method: Should an operative arrive at a job and find he/she has incorrect materials how will you manage this situation?**

The following Service Expectations have been developed to give you FPC's key drivers on the sorts of service FPC is looking for...

**Service Expectations (the list below has come from interviews with key operatives and managers, what does/does not work currently and how we see the service evolving):**

- Minimum 5 day van stocks
- Van stocks reviewed at least every 6 months; monitoring and updating required through this period to assist the major update as part of the ongoing van stock management procedure
- Van stocks held at a central distribution centre, at least 1 version of all van stocks held within this site at any one time
- Consignment van stocks for the Gas team, other areas as a desire not an essential
- 24 hour turnaround time on all parts ordered between Monday – Friday [order placed by 3pm for next day delivery], ideally this will include weekends as well to cover call out/breakdown at non-core times
- In boot service van stock replenishment
- 100% of deliveries delivered to van or agreed drop box location for 7am the next day (only exception to this is if you believe from the data held within the ITT that one of our current trades would pass a depot/branch within a normal working week)
- Ordering facility available from our PDAs, either within our mobile working solution or via an App on our device. Our mobile working solution is Total Mobile all jobs are issued live to our operatives and closed down in the field – reordering van stock/other materials remotely would be ideal. This solution would need to provide both parties real-time response and reporting i.e. on when this part is available especially non-core items, when core items can be collected or delivered
- However, for an order to be submitted an FPC Job Number must be supplied, Operative ID number/Clock number and a valid Purchase Order number should be supplied
- No or very few purchasing cards to be issued all orders should be placed electronically or via a central call centre/back office handling facility. The only Purchasing Cards which can be excepted are those issued to a very few Supervisors, only for emergency purchases
- Central ordering point not via branch – call centre handling our business, to clarify call centre this can be either a standalone call centre facility or a back office service, this we know will depend on the size of the organisations tendering – we will not accept any ordering going through the service desk/trade counter or equivalent. The facility must be available to take orders and deal with enquiries between 8am-5pm Monday – Friday and 9am-12pm Saturday
- No managed store solution required; deliveries to site and managed van stock replenishments critical (van stocks consistently reviewed and evolved every 6 months as a minimum)

- Deliveries of all planned programme items, void parts/packs and heating packs to site. Access to any void property is via key safe – details will be provided per void order
- We must have priority of deliveries and priority of service when our trades have to go into your local branches, for emergency items only (this only relates to our core area branches, mainly Worcestershire)
- Provide two different product prices the specified one and an equivalent other – the agreed product will be assessed as part of the due diligence process by operatives, managers, partners and customers alike, this detailed process will only happen with the successful tenderer prior to contract signing
- Once the product has been agreed, that is our core list price, no purchases away from this product, no movement on price, please lock down our catalogue so only the agreed product can be purchased unless ordered by an approved Supervisor
- Trades will be given full list of agreed items as will the successful merchant, no movement away will be permitted
- All KPIs to be returned monthly, on or before the 5<sup>th</sup> working day of the following month, see KPI section below
- Daily EDI invoices to be issued directly into the finance system (Open Accounts via Open Housing) for all products purchased from the successful merchant(s), see details in **Appendix 3**, only change to this is for Lots 4, 5 or 6 which can be weekly or as appropriate
- Spend analysis report to be issued quarterly along with that months KPI report, or a web portal be accessible to view all spend/produce related data – this data will be used as part of the contract management cycle
- We expect that the same rate of discount be applied on specials as you agree to on the set Cost Models for van stocks, major items etc, this will not form part of the contract/tender but management will be required by all parties to drive these ad-hoc costs down
- Clear credit note/returns procedure, please propose a procedure, this we will develop as part of the due diligence process. Your Returns/Warranty Policy should have been submitted as part of the SQ Section, if you feel you need to submit more information then this is your opportunity.
- Area for waste disposal/storage – offers required especially if you are tendering for Lots 1, 2 or 3.
- We would like to be able to offer our approved subcontractors the same rates as we get. We will not be paying their invoices, this is the subcontractors responsibility but we would like to offer this as a bonus of partnering with FPC.

### **Gas Ordering Module**

Our current Gas Parts service is below, we wish you to provide a response around how you can delivery this service or better it. Is this module transferrable to other service areas, we would be interested to understand a proposal in these terms:

- Minimum 5 day van stocks
- Delivery to rear of engineer vans as required (currently done by a third party delivery company) next day and by 7am
- Delivery cut off times are:
  - 8pm for next day delivery Tuesday – Saturday
  - 5pm for Sunday delivery
  - 1pm for Monday delivery
- Call centre ordering facility – orders placed either electronically or over the phone. Call centre also supports in terms of stock checking, levels and general gas spares enquiries
- Demonstrate provision of O.E.M. parts in 'Plain Box' special agreement with manufacturers
- Central stock holding of various manufacturers Gas Council numbered natural gas appliances
- Consignment van stock across the entire Gas team
- Provision to hold off site at a central distribution centre all our agreed van stocks, exactly as agreed
- An Account Manager to work with our Gas Contracts Manager and manufacturers to constantly monitor products to help update the van stocks and FPC's general specifications – to drive consistent cost reductions which are still fit for purpose
- Return parts collected fortnightly from a central FPC Depot, then credited either locally (current process) or regional

**2. Contract Management/Reporting (weighting – 25%)**

How will you manage the contract throughout its life from a Contract Management/Reporting Perspective? We are keen to learn how you will manage this contract operationally and strategically throughout its life, plus interested in comments around our proposed KPIs, any new ones you have used elsewhere and how these are managed/reported. Your answer needs to focus on the following:

- a. Reporting/Management Information (KPIs)
- b. Contract Management Procedures
- c. Product Innovations/Price Challenges
- d. Increase Customer Satisfaction
- e. Locking down the agreed catalogue
- f. One price per product wherever we go - no rebates

**3. Social Value (weighting – 5%) [*this question is not mandatory for Lot 4, 5 & 6 but you have the option to submit if you wish to*]**

FPC is required to provide one new apprentice for every £1M of contract spend, this is a commitment we expect our major partners to also honour. Please provide details within the table below on what learning and skills support you are willing to offer against this contract based against the potential contract value for the Lots you are tendering for, please complete and add any commentary as required. The numbers entered are for guidance only. We will assess your response as part of the tender evaluation and with the successful tenderer(s) we will work with you to draw up a detailed proposal/action plan as part of the implementation process:

**a. Benchmarked Target for Merchant Services – Employment & Skills Area**

<b>Benchmarks for Refurbishment</b>	<b>Band 2 (Lot 3)</b>	<b>Band 3 (Lot 1 &amp; 2)</b>
	<b>£500k-£1m p.a.</b>	<b>£1m-£3.5m p.a.</b>
<b><i>New Entrants</i></b>		
School/college workshops – no. of students	0	0
Work experience 16+ years – no. of new placement starts	1	2
Apprentices existing (Safeguarded) –no. of existing persons starting on project	1	1
Apprentices new - project initiated (Created) – no. of starts	0	1
<b><i>Existing Workforce</i></b>		
Health & safety training – no. of persons	6	9
Vocational qualifications – no. of persons commencing	0	1
CSCS cards - no. issued	1	2
<b><i>Skills Culture</i></b>		
Short courses – no. of persons	5	11
Progression into employment (under 6 months unemployed) - no. of starts	1	2
Progression into employment (over 6 months unemployed) – no. of starts	0	1

**b. Fortis Living’s Annual Communities Week**

We would expect the successful partner(s) to contribute towards Communities Week. This is an expectation of the contract throughout its life or for as long as Communities Week or a similar successor will last; how would you propose to meet this expectation?

By way of context Communities Week runs for 1 full week in September annually, we are now in the fourth year of this activity. The idea is that Customers suggest schemes which they would like assistance with i.e.

gardening, painting, fencing either within a small area, a block, a scheme or a wider estate and if approved a Project Manager is assigned to organise materials and labour. Further details on historic projects or those assigned to 2017 can be provided upon request. The maximum historic cost of any one of these improvements has been £15,000. This will be the maximum (we expect much lower) which any company will be expected to contribute annually. The maximum will only be called for subject to that years projects and what Lots you are successful in. If you only win one i.e. Lot 4, 5 or 6 we will ask for a far smaller contribution which would be fair to all involved. You will not simply be required to provide materials, other projects have included: labour, project management support, or contributions to local food banks.

NB: Not all successful merchants will be requested annually, dependent on size, spend etc we will discuss this with you as part of the ongoing Contract Management meetings.

#### **ADDITIONAL INFORMATION**

Please provide a breakdown within your submission relating to your price showing a percentage split of that price, for example, split by element cost, 'managed service' cost and profit. If the pricing structure is very similar across all prices then please submit a generic price across the board or per category.

#### **Major Component Specification**

The following table provides details around what FPC currently fits within Fortis Living and/or Rooftop properties. The majority of products have recently been made consistent, with some exceptions. We appreciate that many of these products are own brand products of our main incumbent merchant, so please provide within the appropriate cost model an equivalent own brand product and an alternative. Further details relating to this table can be found within the related Cost Model, Kitchens, Bathrooms and Heating: **Appendices 15, 16 & 18**.

**Kitchens:** All Fortis Living kitchens are provided by Howdens Joinery Co., this is out of scope of this tender and the purchasing of these products will continue to be dealt with directly with Howdens. Rooftop kitchens, however, are provided by Premiere, this is to be included within the procurement, as any successful merchant must have a deal with Premiere to supply and deliver all specified products, see **Attachment 15** for the full Rooftop Kitchen Specification.

<b>Component</b>	<b>Fortis Specification</b>	<b>Rooftop Specification</b>
Kitchen manufacturer (including kitchen sinks)	Howdens (N/A as part of this tender)	Premiere, see <b>Attachment 15</b>
Taps	1. Iflo Lever Basin Taps Chrome	

	2. Iflo Base Basin Taps Chrome	
Waste pipe	Wastes shall be polypropylene waste systems of approved manufacture to BS5255 with similar bottle traps to BS3943	Osma or other equal and approved 76mm resealing polypropylene bottle traps to all sinks. Osma pipes and fittings complying with BS5254 for all new waste pipes
Wall Tiles	Johnson Ceramics International Prismatic Range 150x150x6mm ceramic glazed wall tiles conforming to <b>BS6431</b> : Part 9 (EN159). Colour options: 1) harebell, 2) lemon ice, 3) rice, 4) peppermint, 5) white gloss, 6) Victoria cream	
Plaster	Gypsum hard wall plaster	
Paint	Dulux - Standard Matt Colour options: 1) pale lemon, 2) pale blue, 3) magnolia, 4) white, 5) pale peach, 6) stone	Dulux - Eggshell Colour options: 1) pale lemon, 2) pale blue, 3) magnolia, 4) white, 5) pale peach, 6) stone
Flooring	<ol style="list-style-type: none"> <li>1. Polyflor Polysafe Mosaic Safety Flooring</li> <li>2. Polyflor Polysafe Wood FX Safety Flooring</li> </ol>	
Copper Tube/Fittings	Copper tube complying with BS2871 Part 1 Table X, jointed with Endex end-feed capillary fittings complying with <b>BS864</b>	
Bathroom Sink	<ol style="list-style-type: none"> <li>1. Iflo Cascada Semi Recessed Basin 550x460mm: <ol style="list-style-type: none"> <li>a. 1 tap hole</li> <li>b. 2 tap holes</li> </ol> </li> <li>2. Iflo Cascada Corner Basin 450mm</li> <li>3. Iflo Cascada Cloakroom Basin 360x300mm</li> <li>4. Iflo Cascada Cloakroom Basin 450x370mm <ol style="list-style-type: none"> <li>a. 1 tap hole</li> <li>b. 2 tap holes</li> </ol> </li> <li>5. Iflo Cascada Basin White 550x450mm <ol style="list-style-type: none"> <li>a. 1 tap hole</li> <li>b. 2 tap holes</li> </ol> </li> <li>6. Iflo Cascada Cloakroom Full Basin Pedestal</li> <li>7. Iflo Cascada Standard Full Basin Pedestal</li> <li>8. Iflo Cascada Semi Basin Pedestal</li> </ol>	
Toilet	<ol style="list-style-type: none"> <li>1. Iflo Cascada WC Corner Pan White</li> <li>2. Iflo Cascada Close Coupled Cistern</li> <li>3. Iflo Cascada Close Coupled WC Pan</li> <li>4. Iflo Cascada WC Corner Cistern White</li> <li>5. Iflo Cascada Back to Wall WC Pan</li> </ol>	
Toilet Seat	Tavistock Millennium Toilet Seat (3 options 1) white, 2) antique pine, 3) mahogany)	
Bath	Roca Caria Bath – rectangular steel: <ol style="list-style-type: none"> <li>1. 1700x700</li> <li>2. 1600x700</li> <li>3. 1500x700</li> </ol>	
Shower over Bath Mixer	Diva DLT TSM 106 Lever Thermostat Bath Shower Mixer Tap – Chrome	
Bath Panel	Tavistock 1700 Plain White Bath Panel	

Curtain Rail	Gelson MOD4 800 760x1830mm Silver
Curtain	Gelson Shower Curtain with clips [weighted] (4 options: 1) white, 2) ivory, 3) blossom, 4) splash
Grab Rails	Bathex Grab Rail: <ol style="list-style-type: none"> <li>1. 300x35mm white fluted</li> <li>2. 450x35mm white fluted</li> <li>3. 600x35mm white fluted</li> </ol>
Shower (2 year guarantee as minimum)	Triton T80Z (fast fit) thermostatic 8.5KW with 2 metre hose and riser rail Wet Room: Mira Advance ATL Flex Extra shower 9KW with 2 metre hose and riser rail
Vanity Mirror	HIB drilled mirror 450x300mm, with chrome plated mirror screws
Wet Room Flooring	Polyflor Polysafe Vogue Safety Flooring. Colour options: 1) snow storm and 2) oyster shell
Boiler	Worcester Bosch 30i ERP [combination boiler] Worcester Bosch 15RI ERP [heat only boiler] Worcester Bosch 24i Sys ERP [system boiler] NB: a room sealed condensing A rated appliance
Thermostatic Radiator Value (TRV) & Lockshields (LS)	TRV: <ol style="list-style-type: none"> <li>1. RT212 Drayton (15/10/8)</li> <li>2. Myson Rad Pack (15/10)</li> </ol> LS: <ol style="list-style-type: none"> <li>1. Drayton (15/10/8 inc DO)</li> <li>2. Matchmaster</li> </ol> NB: TRV of 15mm/10mm/8mm capable of mechanical adjustment
Scale Reducer	Electrolytic or Magnetic: <ol style="list-style-type: none"> <li>1. Adey</li> <li>2. Fernox</li> </ol> NB: in-line scale reducer of the electrolytic or magnetic type.
Primary Central Heating Filter	Magnetic Filter: <ol style="list-style-type: none"> <li>1. Adey Magnaclean Professional</li> <li>2. Fernox TF1 Compact</li> </ol> NB: magnetic type filter fitted to the primary heating circuit as per the manufacturer's instructions
Radiator	Radiator/Emitters: <ol style="list-style-type: none"> <li>1. Stelrad Compact</li> <li>2. Stelrad Softline</li> </ol> See <b>Attachment 18</b> for full details – must conform to <b>BS EN442</b>
Controls	Time Clock: <ol style="list-style-type: none"> <li>1. Worcester Bosch</li> <li>2. Neomitis</li> <li>3. Honeywell</li> </ol> Room Thermostat (wireless): <ol style="list-style-type: none"> <li>1. Neomitis</li> <li>2. Honeywell</li> </ol> Other (Cyl stat etc): <ol style="list-style-type: none"> <li>1. Neomitis</li> <li>2. Honeywell</li> </ol>

	<p>NB: fixed wired or wireless controls capable of accurate timed and manual adjustment of heating and hot water systems. Where relevant these will be integrated to the appliance</p>	
Chemicals	<p>Inhibitor:</p> <ol style="list-style-type: none"> <li>1. Adey MC1+</li> <li>2. Fernox F1</li> </ol> <p>Cleanser:</p> <ol style="list-style-type: none"> <li>1. Adey MC3+</li> <li>2. Fernox F5</li> </ol> <p>NB: inhibitor/cleaner will be of a standard to allow systems to be cleaned and inhibited in accordance with <b>BS7593:2006</b></p>	
Electrical	<p>Crabtree specification, see <b>Attachment 7</b></p>	
Shower Trays (built in gravity waste)	<p>Nicholls &amp; Clarke:</p> <ul style="list-style-type: none"> <li>• Vinyl Form Floor Former 1135 x 770</li> <li>• Phlexiflow React Wet Floor Shower Waste Pump Mira/Triton</li> </ul>	<p>Impey - Mendis Tray 100mm threshold shower tray:</p> <ol style="list-style-type: none"> <li>1. 1250x710</li> <li>2. 1250x830</li> <li>3. 1500x710</li> <li>4. 1500x830</li> <li>5. 1800x710</li> <li>6. 1800x830</li> <li>7. 900x900</li> <li>8. 1000x1000</li> <li>9. 1850x710 with end cap (trimmable)</li> </ol>
Shower Door Screens	<p>Nicholls &amp; Clarke:</p> <ul style="list-style-type: none"> <li>• Drop White Shower Curtain 2135 x 2135</li> </ul>	<p>Impey:</p> <ol style="list-style-type: none"> <li>1. Option E: 1 fixed panel +1 FCP +2 bi fold doors</li> <li>2. Option G: 2 bi fold doors straight across</li> <li>3. Option H: 2 bi folding doors corner entry</li> <li>4. Option J: bi fold door &amp; single door on corner</li> <li>5. Option M: fixed panel + FCP + bi fold door</li> <li>6. Option 1: 2 sliding doors on corner</li> </ol>
Shower Seat		<p>Impey: wall mounted fold up shower seat padded back &amp; arms</p>
Curtain Rails	<p>Nicholls &amp; Clarke:</p> <ul style="list-style-type: none"> <li>• Saa Angle Shower Track with Adj Clnng Supp&amp;Fitt CH15B 1700 x 760</li> </ul>	<p>Impey:</p> <ol style="list-style-type: none"> <li>1. L shapped rail 1200x1200 &amp; fixing kit CR1212</li> <li>2. L shaped rail 1300x900 &amp; fixing kit CR1309</li> <li>3. L shaped rail 1500x900 &amp; fixing kit CR1509</li> <li>4. L shaped rail 1500x1200 &amp; fixing kit CR1512</li> </ol>

<p>Other Disabled Adaptation</p>	<p>Nicolls &amp; Clarke:</p> <ul style="list-style-type: none"> <li>• Mira Advance Flex Extra 9KW Shower/CP 4 Westepmponly 1.1643.010</li> <li>• Nicobond Bumpy White 200 x 2501</li> <li>• NB1280 Clarity Mosaic Mix Black/Silver 300 x 300</li> </ul>	
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**KEY PERFORMANCE INDICATORS (KPIs)**

These KPIs have been developed to highlight the areas of the merchants’ performance that FPC feel are important to measure as they have a direct impact on the ability of the in-house delivery team to deliver an effective and efficient service.

It is imperative that the data is collected and analysed regularly. KPIs must be submitted monthly no later than 5 working days after the end of the previous month. As well as the monthly operational review they will be reviewed as part of the quarterly and annual contract management meetings. These KPIs will be used to benchmark performance to provide a basis for continuous improvement, continually monitor performance through the contracts’ life.

All targets will be subject to a formal review at the end of each year to ensure they are adding value and that the targets are appropriate. KPIs subject to approval by all involved can change and evolve annually. Within the detail FPC has set the performance targets for the first and second years these will also be reviewed annually to make them correct and appropriate. These KPIs will form part of the contract.

If the supplier fails to achieve a target for one KPI over 3 out of 6 months or fails to achieve the targets for 3 or more KPIs for any month, FPC will request from the supplier a Rectification Plan to restore performance to the agreed KPI level. The Rectification Plan once requested must be ready to be presented at the next monthly operational meeting and subject to approval by FPC management. If more than one Rectification Plan has been requested, the Supplier will be given 30 calendar days to rectify the ongoing situation.

At each stage it will be initially dealt with by the Operational Group but as soon as a 2<sup>nd</sup> Rectification Notice is issued in respect of the same failure this must be escalated to the Strategic Group to investigate, agree and monitor the plan and if consistent failure occurs the client will consider termination of the contract.

**Contract Management**  
**Strategic Group**

All KPIs will be the responsibility of the Strategic Team for the duration of the contract and as such will be responsible for ultimately reviewing both the

performance against the KPIs and also the effectiveness of the KPIs in delivering value and improvements for FPC's materials supply arrangements.

Any changes in the KPIs, be that quarterly or annually will be agreed, signed off and implemented by this Group. All changes once agreed will be documented and issued to all parties, it is imperative that all parties cascade the correct information down within your organisation(s).

#### **Provisional Agenda**

- Meeting to be Chaired by FPC Managing Director or his/her nominee
- Quarterly and yearly reviews of contract, volumes of purchase and fees
- To monitor the performance of the contract against KPIs and realisation of Value for Money
- To resolve escalated issues including Rectification Notices
- Manage mobilisation plan and agree priorities and delivery
- Develop a partnership culture for contract
- Monitor apprentice scheme/Learning & Skills commitments
- Replacement products/innovations
- Revised work practices or personnel changes approval
- Financial performance – monthly for the first twelve months
- Monitor Health and Safety

#### **Operational Group**

The Operational Group will take responsibility for the day to day delivery of the contract. Monthly this Group will review the performance delivered and report any issues or progress that may be relevant to the contract. Any minutes/actions will be communicated to the Strategic Group.

- Meeting to be chaired by FPC General Manager or his/her nominee
- To review monthly progress against the KPIs
- Undertake delegated tasks as agreed at Strategic Group
- To resolve day to day operational issues
- Track day to day delivery of mobilisation plan
- Initial approval of revised working practices
- Review operational incidents with trade technicians
- Implementing Group actions
- Report any actions taken back to Strategic Group

#### **KPI Implementation Procedure**

During the implementation of the contract the successful supplier(s) and FPC will sit down for a half-day workshop to agree the method of data collection for each KPI. Also at this workshop the method to present the data on a monthly and quarterly basis will be agreed.

The full list and detail of each KPI can be found below but the summary list of the proposed indicators throughout this contract are:

1. Deliveries Correct & On Time
2. Deliveries On Time
3. Core Item Availability
4. Invoice/Price Accuracy
5. Van Stock Services – this KPI will be determined on Mobilisation based on proposal from supplier. FPC as a principal will impose damages based on any loss of productivity made in abortive time and cost in collecting van stock below the set MLAP.

**NOTE:** All damages will be based off the average operatives hourly rate, £30, starting as a minimum at one hour.

**Key Targets**

KPI 1	Deliveries Correct & On Time
<b>Purpose</b>	<p>To determine the percentage of deliveries have all Items been correctly delivered.</p> <p>Please note this KPI applies to Van stock, Heating packs, Void Packs and Programme Works Packs (i.e. kitchens, bathrooms, boilers etc) deliveries</p>
<b>Definitions</b>	<p>For all deliveries a Delivery time within the agreed time frame of order placement (if on a week day and by 3pm the previous day). Deliveries Items must be delivered at the agreed time period to the correct location. Timed deliveries must be communicated to the person placing the order or an appropriate Planner, orders can be delivered between 8am and 4pm. Each delivery must be recorded by the Supplier.</p> <p>The Supplier will keep records of any Items rejected by FPC or which were planned but not delivered or items wrongly delivered. If any one Item in a delivery is incorrect that whole delivery shall be deemed to be incorrect. FPC have the option of rejecting the whole or part of the delivery at their discretion if the wrong item or items have been delivered.</p> <p>At the end of each Measurement Period the Supplier will provide details of:</p> <ul style="list-style-type: none"> <li>• all deliveries scheduled for dates in the Measurement Period;</li> <li>• how many of those were delivered in time;</li> <li>• how many items were delivered incorrectly, or rejected by FPC i.e. for damage.</li> </ul>

<b>Method</b>	<p>For the specified Measurement Period, determine the number of deliveries arranged for dates within the Measurement Period, and the numbers of deliveries that had all Items correct.</p> <p>Performance (%) =  <math display="block">\frac{\text{number of deliveries arranged for dates within the Measurement Period, and the numbers of deliveries that had all Items correct.}}{\text{Total Number of deliveries arranged for Delivery within a Measurement Period}} \times 100</math></p>
<b>Example</b>	<p>100 deliveries arranged to be delivered in May</p> <p>3 x deliveries incorrect, as follows:</p> <ul style="list-style-type: none"> <li>• 2 x delivery supplied the wrong Item although it did arrive on time, so was therefore incorrect; and</li> <li>• 1 x delivery supplied a total of 6 items of which 2 were incorrect. The delivery was on time but is therefore shown as incorrect as 2 of the 6 items were incorrect.</li> </ul> <p>Therefore 97 were delivered correct in May  The KPI score for May is <math>97/100 \times 100 = 97\%</math></p>
<b>Measurement period</b>	Monthly
<b>Report produced by</b>	Within 7 working days from the last working day of the previous month
<b>Target</b>	Year 1: 95% Year 2+: 98%
<b>Minimum Level of Acceptance Performance (MLAP)</b>	Year 1: 91% Year 2+: 95%
<b>Scorer</b>	Supplier
<b>Validation</b>	Supplier/Service providers records
<b>Damages</b>	For every failure to deliver the correct materials, which were not immediately rectified by supplier providing missing materials within 4 hours or first thing following morning if delivery required PM, FPC will charge damages of £30 per failed delivery below the MLAP.

<b>KPI 2</b>	<b>Deliveries On Time</b>
<b>Purpose</b>	To determine the percentage of deliveries that are delivered within the time slot provided on the Delivery Date. Please note this KPI applies to all deliveries.
<b>Definitions</b>	For all deliveries a delivery time within an agreed timeframe of order placement (if on a week day and by 3pm the previous day). Deliveries of Items must be delivered within the agreed period. Timed deliveries must be communicated to the person placing the

	<p>order or an appropriate Planner, orders can be delivered between 8am and 4pm. Each delivery must be recorded by the Supplier.</p> <p>The Supplier will keep records of any Items rejected by FPC or which were planned but not delivered or items wrongly delivered. If any one Item in a delivery is incorrect that whole delivery shall be deemed to be incorrect. FPC have the option of rejecting the whole or part of the delivery at their discretion if the wrong item or items have been delivered.</p> <p>At the end of each Measurement Period the Supplier will provide details of:</p> <ul style="list-style-type: none"> <li>• all deliveries scheduled for dates in the Measurement Period;</li> <li>• how many of those were delivered within the agreed timeframe;</li> <li>• how many items were delivered incorrectly, or rejected by FPC i.e. for damage.</li> </ul>
<b>Method</b>	<p>For the specified Measurement Period, determine the number of deliveries arranged for dates within the Measurement Period, and the numbers of deliveries that were both completed within their scheduled delivery slots on those Delivery Dates</p> <p>Performance (%) =</p> $\frac{\text{Number of deliveries were both completed within their scheduled delivery slots on those Delivery Dates and they were delivered within this period (0800 – 16:00)}}{\text{Total Number of deliveries arranged for Delivery within a Measurement Period}} \times 100$
<b>Example</b>	<p>100 deliveries arranged to be delivered in May</p> <p>2 x deliveries were either late, as follows:</p> <ul style="list-style-type: none"> <li>• 1 x delivery was delivered after the appointed time but was correct and is therefore late;</li> <li>• 1 x delivery supplied the wrong Item although it did arrive on time, so was therefore correct; and</li> </ul> <p>Therefore 99 were delivered on time and correct in May The KPI score for May is 97/100 x 100 = 97%</p>
<b>Measurement period</b>	Monthly
<b>Report produced by</b>	Within 7 working days from the last working day of the previous month
<b>Target</b>	Year 1: 92% Year 2+: 95%
<b>MLAP</b>	Year 1: 89% Year 2+: 92%
<b>Scorer</b>	Supplier

<b>Validation</b>	Supplier/Service providers records
<b>Damages</b>	For every failure to deliver the materials on time, which were not immediately rectified by supplier providing missing materials within 4hrs or first thing following morning if delivery required PM, FPC will charge damages of £30 per failed delivery below the MLAP.

<b>KPI 3</b>	<b>Core Item(s) Availability</b>
<b>Purpose</b>	To determine the percentage of Core Items Ordered that were unavailable at the time of the Order.
<b>Definitions</b>	<p>The number of Core Items not available by unit immediately (as required by the Specification) in a Measurement Period as a percentage of the number of Core Items Ordered during that Measurement Period.</p> <p>For example, if an order were placed for 10 bags of cement/10 consumer units etc and none were available this would be treated as one unit not 10.</p>
<b>Method</b>	<p>For the specified Measurement Period, determine the number of Core Items Ordered and the number of Core Items that were not immediately available within the period required by the Specification.</p> <p>Performance (%) =</p> $\frac{\text{Number of Core Items unavailable when Ordered during the Measurement Period}}{\text{Total number of Core Items Ordered in the Measurement Period}} \times 100$
<b>Example</b>	<p>For the period</p> <p>Number of Core Items unavailable when Ordered – 60 Number of Core Items ordered – 1500</p> <p><math>60/1500 \times 100 = 4\%</math></p>
<b>Measurement Period</b>	Monthly
<b>Report produced by</b>	Within 7 working days from the last working day of the previous month
<b>Target</b>	<p>Year 1: 4% or below per month</p> <p>Year 2: 1.5% or below per month</p> <p>Year 3+: 1% or below per month</p>
<b>MLAP</b>	<p>Year 1: 8% or below per month</p> <p>Year 2: 3% or below per month</p> <p>Year 3+: 2% or below per month</p>

<b>Scorer</b>	Supplier
<b>Validation</b>	Supplier/Service providers records
<b>Damages</b>	For every failure where the supplier is unable to provide the core items when ordered FPC will charge the supplier £30 which is below the MLAP.

<b>KPI 4</b>	<b>Invoicing/Price Accuracy</b>
<b>Purpose</b>	To determine the percentage of Items incorrectly priced and/or invoiced (against the Core List) in invoices submitted by the Supplier in the Measurement Period or any other errors to include volumes of items invoiced
<b>Definitions</b>	<p>Number of Items incorrectly priced or with incorrect data on invoices submitted during the Measurement Period against total number of Items on those invoice(s)</p> <p>For example, if 5 bricks were ordered but the Price per brick on the invoice was stated as 40p rather than 35p this would be treated as one error not 5.</p>
<b>Method</b>	<p>Fortis Living will check each Item on each invoice for accuracy against the Core List or other errors.</p> <p>Performance (%) =</p> $\frac{\text{Number of incorrectly priced Items on invoice(s) (or other errors) submitted in the Measurement Period}}{\text{Total number of Items on invoice(s) submitted in the Measurement Period}} \times 100$
<b>Example</b>	<p>Total number of Items on invoice(s) submitted during the Measurement Period 1500</p> <p>Number of incorrectly priced Items on the invoice(s) 20</p> <p><math>20/1500 \times 100 = 1.33\%</math></p>
<b>Measurement Period</b>	Monthly
<b>Report produced by</b>	Within 7 working days from the last working day of the previous month
<b>Target</b>	<p>Year 1 = Below 1.5%</p> <p>Year 2+ = Below 1%</p>
<b>MLAP</b>	<p>Year 1 = Below 3%</p> <p>Year 2+ = Below 1.5%</p>
<b>Scorer</b>	Supplier
<b>Validation</b>	Supplier/Service providers records

As well as the above suite of KPIs we expect the following data reports to be issued Quarterly, if you have an online portal which provides this information daily, weekly etc please provide details in your tender response, we may want to investigate a portal offering as part of due diligence:

- Reports/Dashboard:
  - On vs off catalogue spend (details and percentages, objective is that within 2 years we are delivering 80% of all jobs from van stocks).
  - Credit notes issues/products returned.
  - Products held within Branch and/or Distribution Hub.
  - Spend Report:
    - Top 100 items by Price & Quantity: On Catalogue.
    - Top 100 items by Price & Quantity: Off Catalogue.
  - All on site collections with job number and operative collecting materials identifying core, non core, van stock, other or specials.

Cost information to be provided to FPC on a monthly basis detailing the following:

- Nett cost of materials issued.
- Breakdown of overheads associated with material costs as follows:
  - Direct cost of delivery of materials to FPC (vans, labour etc, excluding overheads).
  - Counter costs, if appropriate.
  - Depot overhead costs split:
    - Staffing.
    - Accommodation.
    - IT.
  - Overheads
- Head Office overheads.
- Waste management costs.

**FORM OF TENDER**

Once you have completed all sections (or as required) of the above document please enter the Grand Total figures from the appropriate spreadsheets (not the alternative product cost just like for like one) into the table below. This will be used for return purposes only ahead of a full review. The table below shows the Appendix Number, the Cost Model Title and the Lot Number it probably relates to (this is for guidance only), the final column you need to enter your Grand Total against for each of the Cost Models/Lots you are tendering for:

<b>Appendix No.</b>	<b>Cost Model Title</b>	<b>Grand Total</b>	<b>Lot No.</b>
7	Electrical	£	3
8	Carpentry	£	1
9	Plumber	£	2
10	Gas:		2
10a	Repairs (Area 1)	£	2
10b	Service (Area 1)	£	2
10c	Super Stock (Area 1)	£	2
10d	Service & Repairs (Area 2)	£	2
10e	Service Only (Area 2)	£	2
10f	Super Stock (Area 2)	£	2
11	<b>NOT USED</b>		
12	Tools/Power Tools:		6
12a	Power Tools	£	6
12b	Hand Tools	£	6
13	Equipment Hire	£	5
14	Roofing Materials	£	4
15	Kitchens & Additional Items	£	1
16	Bathrooms & Additional Items	£	2
18	Heating Packs:		2
18a	Combi Swap (RHEAT)	£	2
18b	Combi Swap & Conversion (RESP)	£	2
18c	Conventional Swap (RESP)	£	2
18d	Heating Consumables Items	£	2
19	Void Packs	£	1

**NB: As you will expect and may have already seen some components will appear across various Cost Models, as each model is unique, we need to you to cost all items. As part of our evaluation process we will be checking pricing across all models, so expect a challenge if you have entered a different price within one model to the next.**

**As previously stated the Lot Numbers are for guidance only if you feel your organisation can supply, as FPC wishes, the materials within a different Cost Model than that marked against the Lot(s) you are tendering for then please go ahead, every excepted response will go forward to tender evaluation.**

## SECTION 4: APPENDICES

### APPENDIX 1: ANTI-COLLUSION CERTIFICATE

#### Merchant & Material Services

The essence of the public procurement process is that Fortis Living/FPC 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, if applicable). We have not and insofar as we are aware neither have any of our employees, consultants, 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 Prevention of Corruption Acts 1889-1916 nor under Section 117 of the Local Government Act '72; Bribery Act 2010, 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 Agreement, or;
- 7 Contacted any officer of Fortis Living about any aspect of the Agreement 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 Agreement continues in force between us (or our successors in title) and Fortis Living.

*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.

**Signature:** .....

**For and on behalf of:** .....

**Date:** .....

**APPENDIX 2: DECLARATION**

**PLEASE READ, SIGN AND RETURN THE DECLARATION BELOW**

Name Of Organisation:	
Address For Correspondence:	
Contact Name:	
Telephone Number:	
Email Address:	

I/We certify that the information supplied is accurate to the best of my/our knowledge and that I/We accept that giving false, incomplete, misleading or inadequate information that materially affects or could materially affect the decision making process could result in my/our exclusion from the selection process.

**Signature:** .....

**Print Name:** .....

**Position:** .....

**Date:** .....

### APPENDIX 3: eINVOICING INFORMATION

FPC/Fortis Living can allow one of two EDI interface methods, either:

1. **eXtensible Markup Language (XML)** method, using BASDA 3.2.1 XML format for EDI transactions, using this method all interfaces into our Capita back office have already been written against this standard. Currently, by way of an example, we use this method for Purchase Orders.

This method exports the following details from Open Housing to your system in a CSV format:

- Valid operatives
- Valid job numbers

This method then imports the following XML files back into Open Housing:

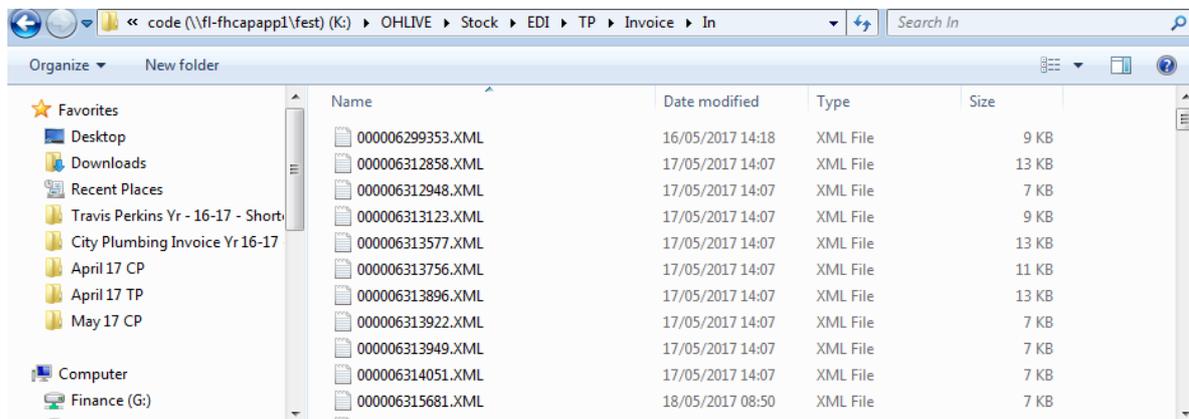
- Stock Catalogue
- Purchase Confirmation Orders
- Purchase Cancellation Orders
- Invoices

2. **Comma Separated Values (CSV)** Universal EDI method.

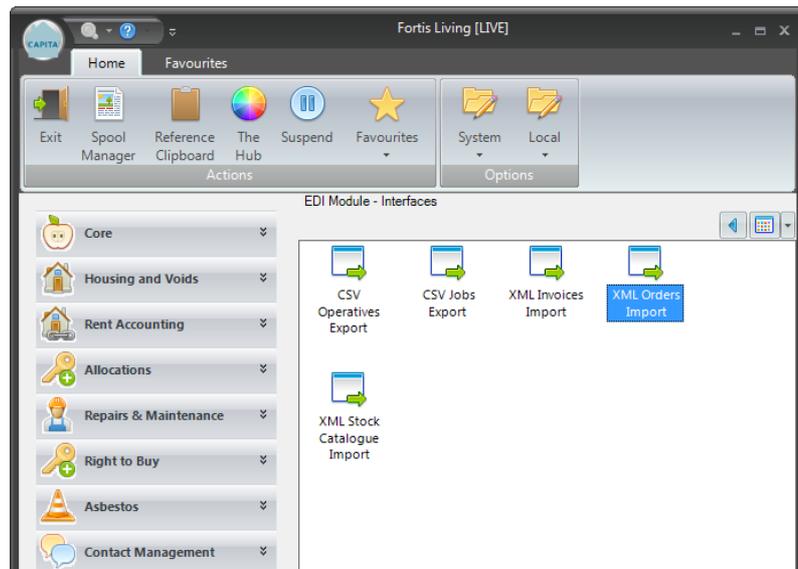
This method uses the same valid operative and job details CSV files as above. However, only Invoice details are imported into Open Housing and created as direct posted invoices.

All supplier files are currently sent and received using email, this method works but going forward we would like to use **File Transfer Protocol (FTP)** to help increase security and reduce risk.

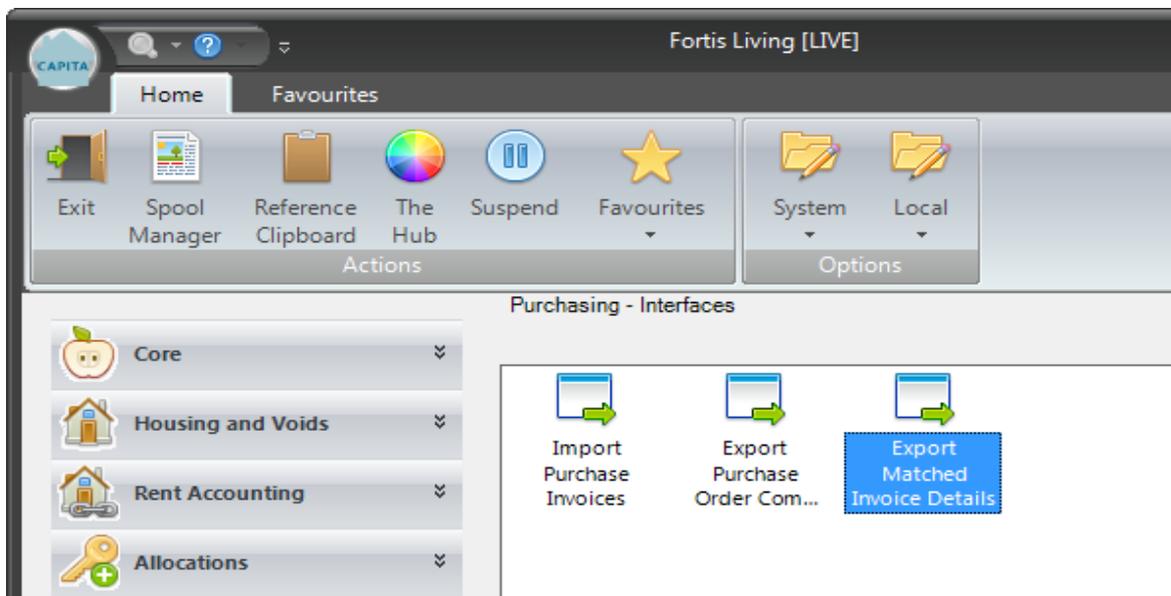
- Employee places order to TP/CP
- PO file sent to Fortis and automatically moved to a folder to be read by Open Housing
- Employee goes to TP/CP and swipes their card (former module)
- Invoice file sent to Fortis and automatically moved to another folder awaiting to be manually picked up by Open Housing



- Manually run an interface to collate all PO into Open Housing



- Manually run interface for the invoices, this will match up all invoice files from the folder against the PO sent through. If they match up and all the information is ok, for instance the price we have in the system matches the price on the invoice, if the item code is in the system as an approved item.
- The matched invoices are then interfaced from Open Housing into Open Accounts manually along with all the other invoices



## APPENDIX 4: HEAT MAPS

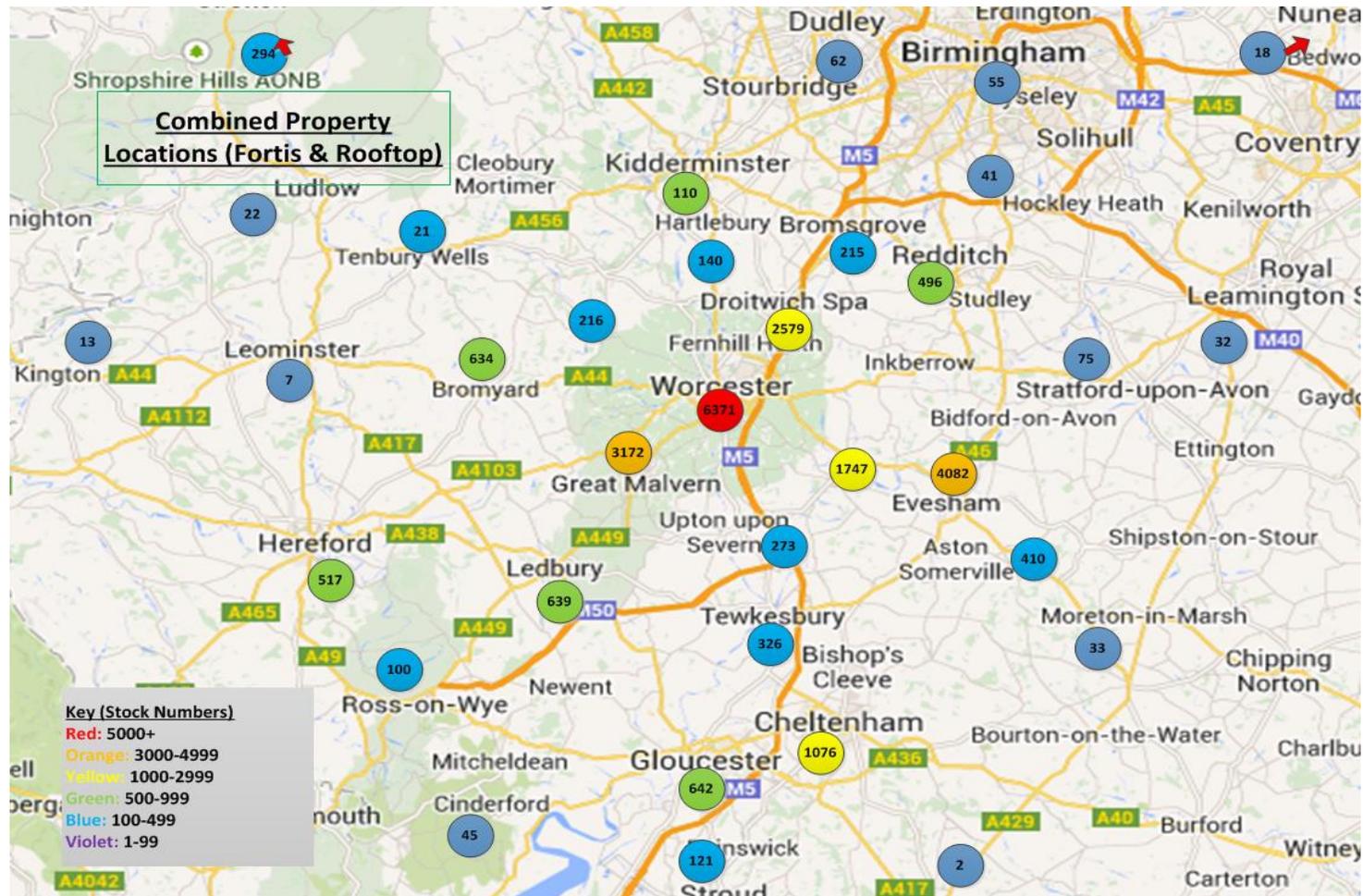


Figure 1: Combined Total Stock Area/Number (Fortis Living & Rooftop Housing)

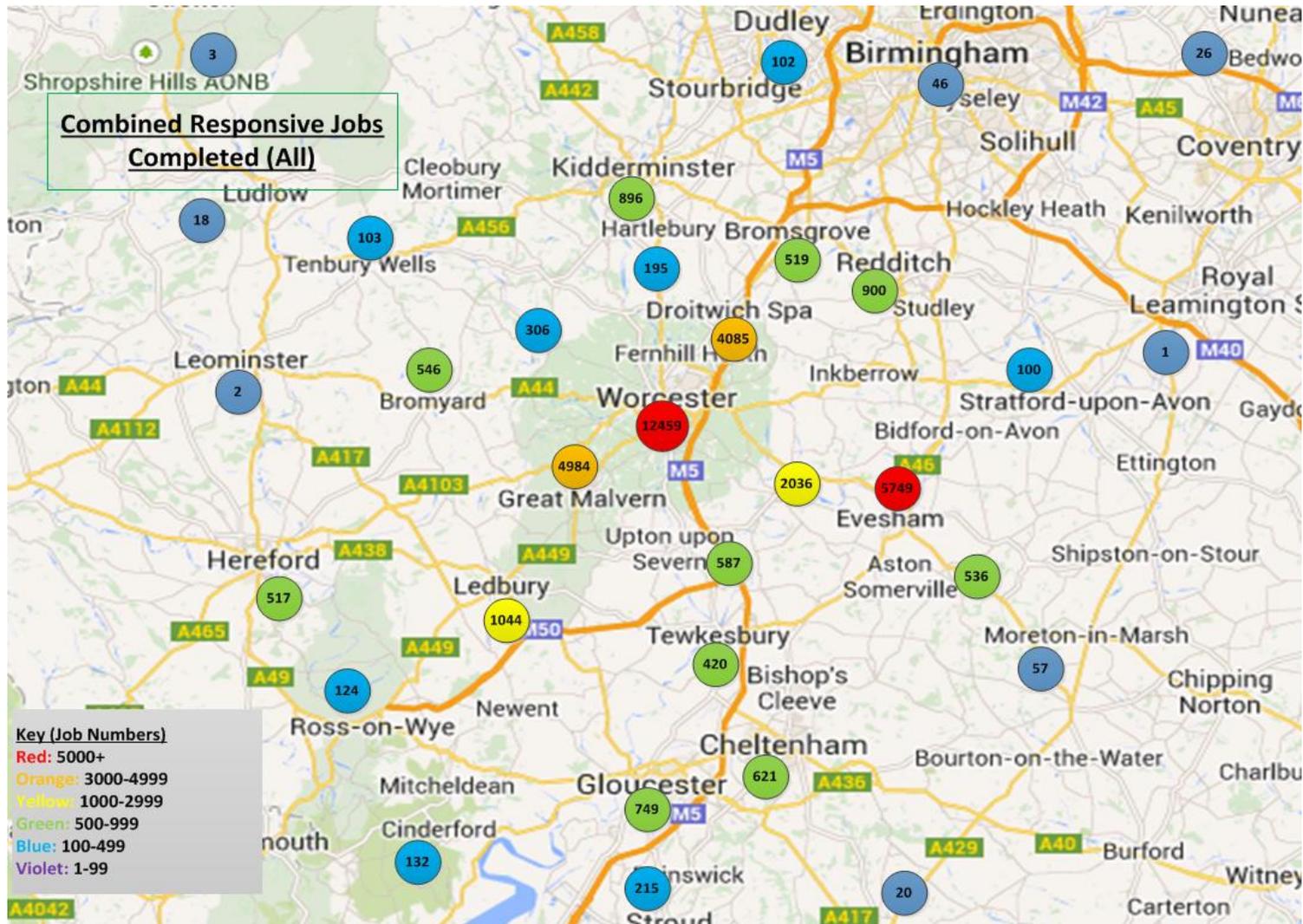


Figure 2: Combined Completed Responsive Jobs – 8 Months 2016/17 (Fortis Living & Rooftop Housing)

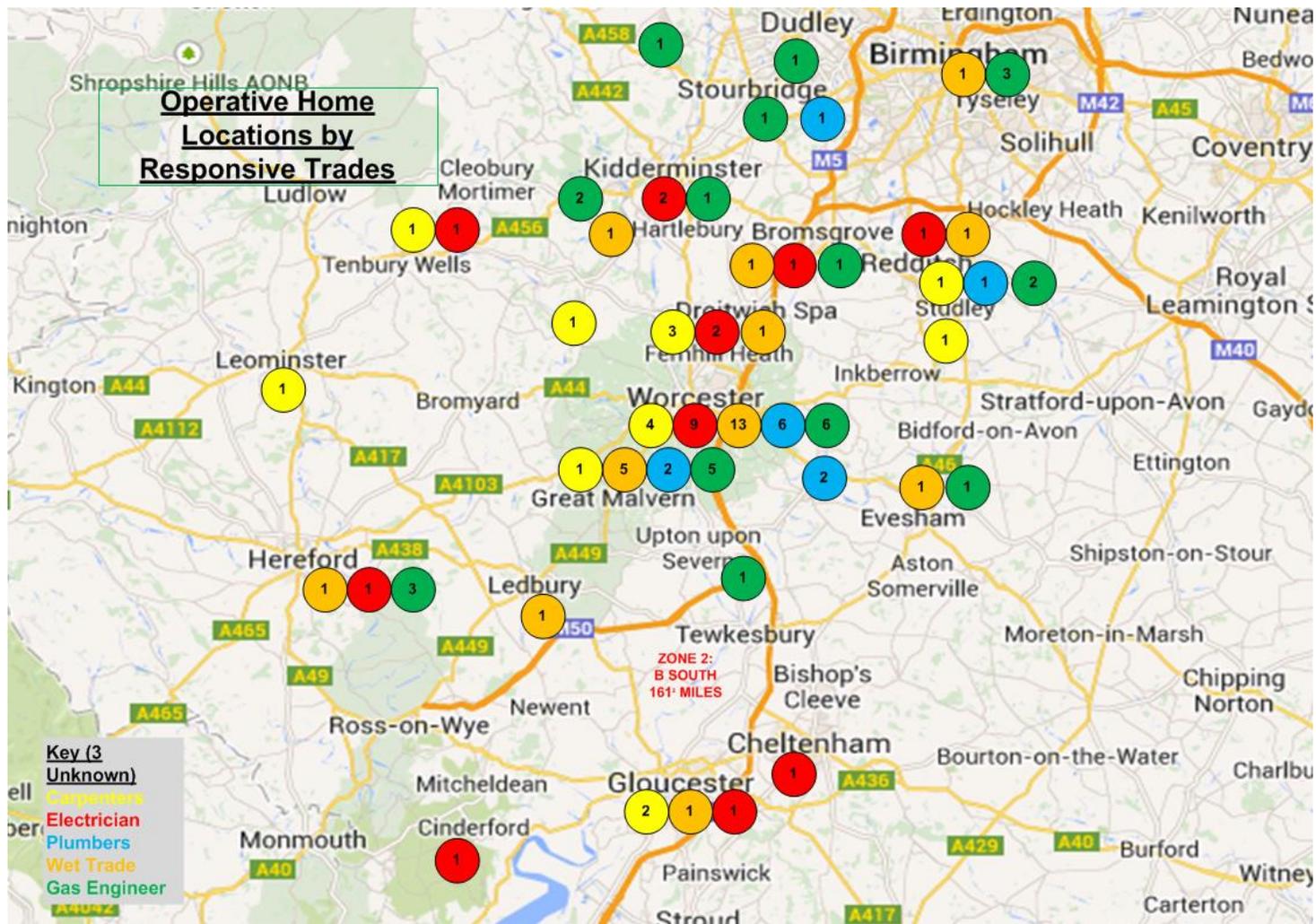


Figure 3: Operative Home Locations Working On The Responsive & Gas Contracts Only [as at May 2017]

## APPENDIX 5: SUMMARY OF EMPLOYMENT & SKILLS AREAS

The purpose of this Appendix is to provide outline details of the employment and skills areas that are contained within the employment and skills plan (ESP), and provide more details so you can respond to our employment agenda requirements.

It also provides guidance on completing the output figures covering both monthly anticipated outputs together with 6 monthly and 12 monthly summary information. [Please refer to Appendix A for the ESP template. – There are descriptions following the bold headings in each numbered section below.] These guidelines are in italics in the numbered sections below and also refer to Appendices D and E.

<b>New Entrants</b>
<p><b>School / College workshops</b> – educational workshop activities that are delivered by main Contractors / sub-Contractors / manufacturers / suppliers within the school or college, or in the workplace. This is to support, for example, the Construction &amp; Build Environment Diploma and other relevant areas of the educational curriculum.</p> <p><i>ESP monthly outputs and summary information – number of students.</i></p>
<p><b>Work experience 16+ years</b> – work experience placements at the site / factory / office undertaken with main Contractors / sub-Contractors / manufacturers / suppliers. This can include block placements of one week or more, or one / two days per week. Can also include Entry to Employment and University Student placements which will be particularly relevant for larger projects. A work experience placement is to be a minimum of 20 days.</p> <p><i>ESP monthly outputs and summary information - number of new placement starts</i></p>
<p><b>Apprentices</b> – existing (safeguarded) individuals who are employed on an apprenticeship programme recognised by the relevant sector skills council and who were already an apprentice prior to starting on the scheme.</p> <p><i>ESP monthly outputs and summary information – number of persons (existing apprentices) starting on project</i></p>
<p><b>Project initiated apprentices (created)</b> - an individual who has been recruited as part of the project and is employed on an apprenticeship programme recognised by the relevant sector skills council.</p> <p><i>ESP monthly outputs and summary information – number of starts</i></p>
<b>Existing Workforce - Skills Development</b>
<p><b>Health &amp; Safety training</b> – employees undertaking certified and industry recognised training courses. These could include NEBOSH, SMSTS, PASMA, abrasive wheels etc.</p>

<p><b><i>ESP monthly outputs and summary information – number of persons</i></b></p>
<p><b>Vocational Qualifications</b> – employees undertaking workplace assessments to achieve National Vocational Qualifications within the range of level 2–5. Further and higher education qualifications such as National Certificates, Higher National Certificates and Foundation Degrees can also be included in this section.</p> <p><b><i>ESP monthly outputs and summary information – number of employees inducted on an NVQ or starting a further or higher education qualification.</i></b></p>
<p><b>Construction Skills Certification Scheme (CSCS) skills card</b> - A skills card demonstrates that the holder is competent in their respective role. Employees will need to have the appropriate NVQ or equivalent qualification and have passed the appropriate health &amp; safety test.</p> <p><b><i>ESP monthly outputs and summary information – number of employees who have been issued with a CSCS skills card with the appropriate vocational qualification (this excludes cards which have been issued as renewals)</i></b></p>
<p style="text-align: center;"><b>Development of a Skills Culture &amp; Infrastructure</b></p>
<p><b>Short courses</b> – covering topics such as leadership and management, basic skills, English for speakers of other languages (ESOL), waste management, work-based recorder training etc. One person is equivalent to 1 day of training.</p> <p><b><i>ESP monthly outputs and summary information – number of persons undertaking training</i></b></p>
<p><b>Progression into employment (under 6 months unemployed)</b> – people who have been registered unemployed for up to six months being offered work lasting at least 13 weeks. This does not include apprenticeships.</p> <p>This could include Job Centre Plus employment initiatives which can often include incentive payments and contributions towards training.</p> <p><b><i>ESP monthly outputs and summary information – number of persons who have started employment.</i></b></p>
<p><b>Progression into employment (over 6 months unemployed)</b> – people who have been registered unemployed for more than six months being offered work lasting at least 13 weeks. This does not include apprenticeships.</p> <p>This could include Job Centre Plus employment initiatives which can often include incentive payments and contributions towards training.</p> <p><b><i>ESP monthly outputs and summary information – number of persons who have started employment.</i></b></p>

**DOCUMENT CLOSE**

**TENDER DEADLINE 13:00 23<sup>RD</sup> OCTOBER 2017**