

**Air Conditioning Service**

**2020 – 2022**

Invitation to Tender

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**Introduction**

The TEC Partnership, formerly the Grimsby Institute Group, is one of England’s largest providers of further and higher education. With a rich history of developing innovative training and education solutions for the community, the Partnership comprises the Grimsby Institute, University Centre Grimsby, East Riding College, Scarborough TEC (formerly Yorkshire Coast College), Skegness TEC (formerly Lincolnshire Regional College), The Academy Grimsby and Career 6. More recently, it has expanded to offer exceptional training provision through National Employer Training and Modal Training. An Ofsted Outstanding provider, it has been awarded numerous accolades including TEF Silver, EdTech Demonstrator and Microsoft Showcase status, a 2019 Learning Technologies Award and two 2020 AoC Beacon Awards.

**Part A - Instructions to Tenderers**

Further to your Interest, the TEC Partnership invite you to tender for the works described within this invitation to tender. The tender shall conform to the requirements set out in these documents and shall be exclusive of Value Added Tax (VAT).

The invitation to tender is for the appointment of a contractor to undertake **Air Conditioing Service**  for the TEC Partnership.

The whole tender must be received no later than **12 noon, Tuesday, 13th April 2021.**

The College shall not be under any obligation to accept any tender.

It is anticipated that the tenderer will apply for the lot in its entirety. Tenderers offering to undertake only part of the contract will be rejected.

The TEC Partnership does not accept any liability for any expenses incurred by any supplier in the preparation of tenders, portfolios or attendance at any meetings or presentations.

The TEC Partnership reserves the right to cancel the entire or parts of the tender, without such an action conferring any right to compensation on the Tenderers.

The tender proposal must be based upon the specification set out in the tender documentation.

The TEC Partnership shall not be bound to accept the lowest or any tender proposal.

In case a tender appears to be abnormally low in relation to the services to be provided, the TEC Partnership will request a clarification in writing and/or explanation concerning its elements. The TEC Partnership reserves the right to exclude a tender, if after a verification process based on the explanations and evidence received it comes to the conclusion that the tender is abnormally low.

**Queries:** Where tenderers have any queries about the tender documentation which may have a bearing on the offer to be made, these should be raised as soon as possible via the In-tend system. Where any such enquiry has been made, the TEC Partnership may circulate to all tenderers a copy of the enquiry and the written reply, although anonymity will be preserved.

**Viewings:** Site visits can take place strictly by appointment only. The Government’s guidelines on social distancing rules will apply to the site visit.

**To make arrangements to view and inspect the premises please contact:**

Michelle Baughan – PPM and Compliance Manager(**PPM**)

Estates Department, TEC Partnership

Tel: 01472 311222 – Ext 1290 or 07789 373957 / Email: [baughanm@grimsby.ac.uk](mailto:baughanm@grimsby.ac.uk)

**Tender Return and Validity**

**Complete and upload one copy of**:

1. Your proposal (Part E Services and Standards) which includes your Service Offer, Programme of Work in no more than 1000 words along with example method statements and risk asssessments
2. The bona fide Tender Declaration (Section 1) which includes your costs broken down as requested.
3. A completed Conflict of Interest form regarding your proposed management team (Section 2)
4. A completed due diligence and self certification form and associated documentation (Section 3)

**All tender submissions should be made electronically through the In-tend system. Manual returns may be discarded and not considered.**

***Undertaking of Confidentiality***

The **TEC Partnership** has appropriate technical and organisational measures to comply with the General Data Protection Regulation and Data Protection Act 2018. The information provided in a tender submission is only used for the purpose it is collected for to inform the evaluation and contract award process of this ITT.

The **TEC Partnership** undertakes its best endeavours to hold confidential, any information provided by you in your tender submission, subject to its obligations under law, including the Freedom of Information (FOI) Act. **The TEC Partnership** excludes personal data submitted as part of a tender submission in an FOI response. Should you wish any of the information supplied by you in your submission not to be disclosed because of its sensitivity, you must identify the information and specify the reasons for its sensitivity. The **TEC Partnership** will consult with you about this sensitive information before making a decision on any FOI request received. If no information is identified as sensitive, with supporting reasons, then it is likely to be released in response to an FOI request.

Information on the successful contract award is held for 6 years following the end of the contract. Unsuccessful submissions are held for 1 year after the commencement of the contract.

**Part B - The Process and Timetable**

Below are the key dates for the tender exercise and subsequent appointments:

|  |  |
| --- | --- |
| Tender issued | Monday, 22nd March 2021 |
| Site Visits | **Nuns Corner Campus** –  Monday, 29th March 2021, 10.30am  **Scarborough TEC Campus** –  Tuesday 30th March 2021, 10.30am  **East Riding Campus**  Wednesday 31st March 2021, 11am |
| Date for final questions to be asked by | Friday, 9th April 2021 |
| Tenders to be returned | 12 noon, Tuesday, 13th April 2021 |
| Appointment of Contractor | Thursday, 22nd April 2021 |
| Pre Commencement Meeting | Wednesday, 5th May 2021  Nuns Corner Campus, Grimsby DN34 5BQ |
|  |  |
| Commencement of contract | Monday, 10th May 2021 |

Please note that all the dates referred to above are currently anticipated and may be subject to change.

**Part C - Selection Procedure**

The contract will be awarded to the most economically advantageous tender applying the award criteria and evaluation methodology provided in Section 4.

Pricing: Scores will be awarded for price on the following basis:

The lowest Contract Price submitted in accordance with the Schedule of Prices will be awarded the highest score and all other Tenderers will be awarded pro rata scores on the relative competitiveness of their Contract Price compared to the lowest Contract Price e.g. (Lowest Contract Price / Contract Price \* 100) = X%.

The TEC Partnership will be evaluating your responses in the following key areas:

|  |  |  |
| --- | --- | --- |
|  | Requirement | Score |
| Commercial | Fee proposal | 50% |
| Ability | Service Offer | 40% |
| 1.3 Relevant Experience & examples (Section 3) | 10% |
| 1.1 Supplier details | P/F |
| 1.2 Bidding model | P/F |
| 1.4 Minimum Organisaitonal Standards and Qualification | P/F |
| Insurance cover (Section 3) | P/F |
| Equality & Diversity (Section 3) | P/F |
| Health & Safety (Section 3) | P/F |
| Environmental (Section 3) | P/F |
| Signed declaration | P/F |
| Modern Slavery Act declaration | P/F |

**Duration**

The tenderer shall be prepared to commence the service on **Monday, 10th May, 2021,** being the commencement date referred to in the contract conditions of the contract documentation.

The duration of the contract will initially be for a period of two years with an option for a one-year extension. The TEC Partnership reserves the right to cancel the contract at the end of the first year having previously given 3 months written notice to do so.

**Part D - Documents to be made available on Appointment**

**TEC Partnership Documentation**

* TEC Partnership strategies or reports as may be appropriate
* TEC Partnership Prospectus
* Contractor Handbook – Acceptance of these requirement will be required upon appointment

**Part E - Standards & Services Required**

**Please read this tender document carefully and ensure that for all elements required, you provide evidence or a statement to fulfil the requirements.**

**Introduction**

The Partnership invites all suitably equipped companies to tender for a planned preventative maintenance

service contract for all air conditioning units as listed in Appendix 5 site asset list of this document.

**General Provisions**

The contract covers the provision of trained and skilled labour of the appropriate grade and trade for the different aspects of the work, in particular skilled operatives and labour capable of carrying out all of the servicing, inspections, checks and testing, together with the ability to verify and diagnose fault conditions from the tests carried out and fully complete all certificates and record sheets for each installation.

The Contract is to be based on a standard unit cost per site per year.

The Contractor shall provide a full programmed maintenance regime to include checking, cleaning and testing all of the equipment forming the Air Conditioning Systems as necessary to ensure their proper and safe operation.

In the event that a problem which cannot be rectified during the course of the programmed service visit is discovered by the maintenance engineer, the engineer shall inform the PPM & Comliance Manager and fully complete all certificates and service record sheets for each installation before leaving the site. Within 5 working days the Contractor shall provide the with a quotation to carry out the necessary repairs so as to restore the system to full operational order.

The successful contractor will be required to produce a life condition report of each unit within the first year. This report should be provided to the PPM & Compliance Manager.

The Partnership may not require all assets listed to be serviced and reserves the right to make the final decision on the number of assets( including new addition)  it requires servicing.

Any remedial work identified will be subject to separate quotation/tenders and will be available to other contractors or organisations to quote for.

**Requirments**

Servicing, frequency & Minimum Standards of General Plant:

All units will require an annual service which will consist of the following as a minimum;

• Inspect outdoor unit for proper refrigerant level and take appropriate action to adjust if

necessary.

• Inspect compressor for proper oil levels and adjust if necessary.

• Clean dirt, leaves and debris from inside and around outdoor units.

• Inspect coil and cabinet – clean as needed.

• Inspect heat exchanger or heating elements.

• Clean and replace all filters.

• Clean and disinfect evaporator coils.

• Inspect drain pans for restricted drain openings – remove obstructions as necessary.

• Inspect fan motor and fan blades for wear and damage – on older models lubricate as needed.

• Inspect control box, associated controls/accessories, wiring and connections. Controls may include contactors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear and damage.

• Insert fan coil air fresheners where necessary.

• Insert drain pan disinfectant tablets to all air conditioning drain pans.

• Leak test system

All relevant equipment must be PAT tested with the accompanying certification

All test equipment must be properly calibrated with accompanying certification

All works where required will be fully certified and appropriate drawings and manuals supplied as necessary

All materials used will be new and free of any corrosion or other form of deterioration.

The successful contractor is required to undertake the following as part of this tender;

* Work on site to commence within 10 days of award of job unless otherwise agreed. Work on external units can be undertaken at anytime, however internal assets by arrangement with the Planned Preventative Maintenance Manager and usually during non term times.
* All appropriate works will require an approved risk assessment/method statement prior to work commencing.
* Contract reviews – dealing with performance, improvements & recommendations for both parties.

The service work shall be carried out according to the provisions of the British Standards and industry guidance.

Although the maintenance tasks are presented in a checklist format applied to generic types of plant, it is not implied that maintenance responsibilities should be defined in this way.

The Contractor is responsible for maintaining the entire system, not just groups of components.

**Some of the units are located at height and as such you are strongly advised to take advantage of the site visit offer.**

**The successful contractor will be required to consider the working at height issues and ensure that appropriate risk assessments and method statements are in place.**

**Your submission should include costs for accessing units at height and you should stipulate in your return how you propose to undertake those works whilst complying with the Working at height directive.**

The successful contractor will be required to produce a life condition report of each unit within the first year. This report should be provided to the PPM Manager.

The assets listed may be removed during the contract term. This will not draw any additional charges to the contract. Similarly any new assets may be added to the list during the contract term and would be deemed to be included at the same costs of similar models for maintenance and servicing.

**Management of Contract**

The Planned Preventative & Compliance Manager will be the main contact with regards to any coordination of the contract and program.

During the works at the individual sites there will be support from the following personal:

Grimsby Institiute & Skegness TEC

Gavin Hall

Maintenace Manager

Scarborough TEC

Geoff Adams

Estates Manager

East Riding College

Dan Marley

Facilities & SHE Manager

**Orders & Payments**

Upon appointment an authorised PO will be issued to confirm the order, TEC Partnership breaks down its orders by cost centres and by property.  All invoices and any future correspondence relating to this contract must reference the PO number.

Invoices must be submitted with the relevant job sheet or at least a reference to the job sheet which may be issued.

All invoices and accompanying job sheets should be emailed no sent in paper format.

|  |  |  |
| --- | --- | --- |
| **Site** | **Post Code** | **Legal Entity Name – To be used for invoices** |
| Modal Training Centre | DN40 1FN | Modal Training Ltd |
| All other sites | See Appendix 5 Doc. 1 | TEC Partnership |

**The original invoice must quote the official PO number and emailed to**[**finance@grimsby.ac.uk**](mailto:finance@grimsby.ac.uk)

Failure to comply with the above requirments will result in late payment.

**Programming of works**

Works are best scheduled within the out of term times so as best not to interfere with the integral business running of the organisation.

Programming of works will be discussed during pre-commencement meeting upon successful appointment.

It is anticipated that the first visit works will be conducted at all sites within 3 months of the commencement of the contract.

Please note the TEC Partnership has a property rationalisation strategy where by the number of its premises is likely to change/reduce over time which may reduce the number of items of plant covered within this contract. The reduction of any units over the time period of this contract will not entitle the successful contractor to any compensation payments.

Similarly any new assets may be added to the list during the contract term and would be deemed to be included at the same costs of similar models for maintenance and servicing.

Appendix 5 Document 2 Asset List included in the tender documents a schedule giving details of properties and assests.

In the case of ‘split’ air-conditioning units the Equipment Schedule may only list the external unit, however the contractor is responsible for maintaining the entire system.

The Contractor shall update the Asset List to reflect any additional items of plant found during site surveys conducted during maintenance visits and remove any items of plant as instructed by the PPM Manager.

**Data Capture**

The successful contractor will be required to update the existing asset referencing system (i.e. re-labelling units with asset numbers). The required referencing system will be agreed with the successful contractor upon appointment. The successful contractor will also be supplied with a spreadsheet and required to update the asset list for The Partnership as a part of the asset referencing process.

Support TEC Partnership in maintaining an F Gas Register.

**Reporting Requirements**

On being awarded the contract, all reports and records will be provided to PPM & Compliance Manager in electronic format, and use photographs within the report to highlight any faults or required remedial work.

Any remedial work identified will be subject to separate quotation/tenders.

General Service Report

The Contractor shall submit service reports electronically complete with the invoice, and if

necessary a quote for any required remedial works, to the PPM & Compliancer Manager.

In addition to the individual service reports for each item of plant, a summary sheet shall be

attached noting any defects requiring remedial works undertaking.

The service report shall contain and make reference to the following:-

Date of the service visit.

Property name and address.

Property number (as the Equipment Schedules).

Name of person requesting the works

Contractor name, address and telephone number.

Plant manufacturer, model, serial number, age, refrigerant type and amount of charge, gas

pressure and liquid pressure, and GWP of the system.

Refrigerant additions, refrigerant removal, details of leak test.

A statement of the condition of the other items required by the respective service routine.

Details of replacement parts fitted or required.

Details of any outstanding actions.

Details of any repaired leaks.

Additional comments

Property representative name and signature.

Engineer’s name and signature.

Photographs to highlight any defects requiring attention.

Examples of service reports can be submitted within the Tender return.

Report Presentation

The contractor is to email service reports within 14 days of the service date.

**Conduct of Work**

Please refer to contractor’s handbook.

**Access to premises**

Please refer to contractor’s handbook. Confirmation of specific site access will be discussed during pre-commencement meeting upon successful appointment.

**Disposal of Waste Materials**

It will be the responsibility of the contractor to remove all waste materials and dispose of within current waste regulations.

**Health and Safety Requirements**

The successful Tenderer will be required to submit risk assessments and method statements(RAMS) for the likely tasks that will be carried out during the contract. Generic RAMS may suffuce; however, they must be relevant to the scope of work and work environment and cover all reasonably foreseeable risks. Where RAMS don’t cover the points aforementioned, additional reviews or information may be requested by the Health and Safety team.

The TEC Partnership operates a permit to work system, for permit to be issused, we will require the submission of RAMS to be at least 48hrs prior to commentcement of work. Provisions must be made for obtaining a permit to work in person from the Health and Safety Team within office hours Mondauy – Thursday 08.30 – 16.30hrs and Friday 08.30 – 16.00hrs. Please allow for these conditions within your pricing.

Accompanying document (Appenedix 5) identifies assets that are not located at ground level. The successful contractor will be required to consider the working at height issues associated with these assets and ensure that apprpiate risk assessments, method statesments and mitigation are in place along with evidence of specific competence/training to use access equipment or specialist equipment that is chosen as part of that risk assessment. The successful contractor will be required to ensure that appropriate costs for your chosen method of working at height is included in your pricing.

**Health and Safety Team**

Grimsby Institiute & Skegness TEC

Jon Troop

Group Health and Safety Manager

Emma Larder

Health and Safety Officer

Scarborough TEC

Mark Hoyle

Health and Safety Officer

East Riding College

Dan Marley

Facilities & SHE Manager

**Minimum Organisational, Operational standards and Qualificaitons required by the TEC Partnership is\*:**

* Refcom Registered
* F Gas Certification
* Health and Safety Accreditaion
* All staff to have had Asbestos awareness training.
* Confirmation of Staff Technical Ability – Key Staff involved in the practical element of undertaking the works: CV’s, Training Records

- Operatives certificated to NVQ Level 2 or equivalent

- Operatives certificated to City & Guilds 2079

* DBS disclosure

As an educational establishment where persons are working with children and vulnerable adults on a regular basis it is mandatory that all persons working unescorted on all TEC Partnership sites have successfully completed an Enhanced DBS disclosure.

All appropriate Contractors must have received their Enhanced DBS disclosure before working unescorted on TEC Partnership sites and are advised to start their application without delay if they have not already done so. Failure to do so in a reasonable timescale or an unsuccessful application could result in a contract being terminated.

All Contractors attending works on TEC Partnership sites should apply for a personal Contractor’s badge of which is proof that your staff member holds an acceptable DBS. To attain this badge, the Contractor needs to provide a list of all staff likely to work on this contract and advise their DBS number and date to the Estates Helpdesk. If there are any conviction(s) the Partnership can/may request details of the conviction(s) before deciding to issue the Contractor an ID card. Failure to attend site without the personal Contractors badge will result in the Contractor being escorted throughout works provided, at a cost to your Company or escorted off site completely.

You will be required to have valid Enhanced DBS checks in place by the commencement of the contract. Any delay in providing the correct (within 3 years check) by the commencement date could lead to the contract being cancelled and any associated costs claimed back.

\*Evidencing this requirement is done using the self declaration process, section 1.4 in Section 3.

**Site Address - Main Contract Administration Site**

PPM & Compliance Manager – Estates Department

*Nuns Corner Campus*

*Laceby Road*

*Grimsby*

*N E Lincs*

*DN34 5BQ*

**The Current Users**

TEC Partnership

**Site Features**

Live teaching and learning environments, offices and Halls of Residence across North East Lincolnshire, Lincolnshire, Hull, East Riding and North Yorkshire.

Payment Terms – Prompt Payment

Upon appointment an authorised PO will be issued to confirm the order, the TEC Partnership breaks down its orders by cost centres. All invoices and any future correspondence relating to this contract must reference the PO number. Invoices must be submitted with the relevant job sheet or at least a reference to the job sheet which may be issued. All invoices and accompanying job sheets should be emailed not sent in paper format.

1. Where the Contractor submits an invoice to the TEC Partnership will consider and verify that invoice in a timely fashion.
2. The TEC Partnership shall pay the Contractor any sums due under such an invoice no later than a period of 30 days from the date on which the TEC Partnership has determined that the invoice is valid and undisputed.
3. Where the TEC Partnership fails to comply with paragraph 1 and there is an undue delay in considering and verifying the invoice, the invoice shall be regarded as valid and undisputed for the purposes of paragraph 2 after a reasonable time has passed.
4. Where the Contractor enters into a Sub-Contract, the Contractor shall include in that Sub-Contract:
5. Provisions having the same effect as clauses 1-3 of this Agreement; and
6. A provision requiring the counterparty to that Sub-Contract to include in any Sub-Contract which it awards provisions having the same effect as clauses 1-3 of this Agreement.
7. In clause 4, “Sub-Contract” means a contract between two or more suppliers, at any stage of remoteness from the Partnership in a subcontracting chain, made wholly or substantially for the purpose of performing (or contributing to the performance of) the whole or any part of this Agreement.

Further details can be found in our standard Terms & Conditions.

**Section 1 - Pricing Summary and Bona fide tender declaration**

I/We offer to provide the services as outlined in the Invitation to Tender for **Air Conditioning Service** for the TEC Partnership.

I/We understand that theTEC Partnershipis not obliged to accept the lowest or any tender.

I/We give below the proposed fees for the various stages of the project (exclusive of VAT) but inclusive of all costs relating to travel subsistence and all other disbursements.

If the TEC Partnership suspects that there has been an error in pricing of the tender, it reserves the right to seek clarification as it considers necessary from that tenderer only.

**Expenses and Disbursements**

All expenses will be accounted for in your fee proposal.

**Statutory Fees**

The College will pay all fees in respect of applications under Planning, Building Regulations and other Statutory requirements

**Tender Price Structure**

Your tender submission should detail:

* Cost of servicing and assessing each asset for 1 years’ service and inspection, inclusive of all service reports in hard copy and electronic format.
* Sum of the total cost of the project over 2 years.

 Please add in your pricing structure to **Appendix 5 Air Conditioning Service Asset List**

Any other costs deemed relevant.

Sum of total cost of the project.

**All prices should be NET of VAT**

**Declaration**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| I declare that to the best of my knowledge the answers submitted to these questions are correct. 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, and I am signing on behalf of………………………………………………………… (insert name of supplier).  I understand that the TEC Partnership may reject my submission if there is a failure to answer all relevant questions fully or if I provide false/misleading information. I have provided a full list of any Appendices used to provide additional information in response to questions.  I also declare that there is no conflict of interest in relation to the TEC Partnership’s requirement.  The following appendices form part of our submission;   |  |  | | --- | --- | | **Section of ITT** | **Section Number** | |  |  | |  |  | | |
| **ITT completed by** | |
| **Name** |  |
| **Role in organisation** |  |
| **Date** |  |
| **Signature** |  |
| **Email** |  |
| **Direct Tel No:** |  |

In submitting a tender, including the Pricing Schedules, for these works the **TEC Partnership** deems the tenderer to have agreed to be legally bound by the following declaration:

Recognising the principle that the essence of selective tendering is that the employer receives bona fide competitive tenders from all firms tendering, we certify that we will submit such tender, and that we will not fix or adjust the amount of the tender by or under or in accordance with any agreement or arrangement with any other person. We also certify that we have not done and we will not do at any time before the date for this tender to be submitted, any of the following acts:

1. Communicate to any person other than the person calling for our tender the amount or approximate amount of the proposed tender.

2. Enter into any agreement with or arrange for any other person to refrain from tendering, or indicate the amount of any tender to be submitted.

3. Reward, or promise to reward, any person for performing or causing any of the actions or effects described in 1 or 2 above.

In this declaration, the word ‘person’ includes any persons, bodies or associations, corporate or incorporate; and ‘any agreement or arrangement’ includes any such transaction, formal or informal, and whether legally binding or not.

**Section 2 – Conflict of Interest**

I/We………………………………………………………………of………………………………………………………. declare below my/our interests in respect of the tender submitted.

The TEC Partnership may exclude the Supplier if there is a conflict of interest which cannot be effectively remedied. The concept of a conflict of interest includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.

Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Supplier to inform the TEC Partnership, detailing the conflict below. Provided that it has been carried out in a transparent manner, routine pre-market engagement carried out by the TEC Partnership should not represent a conflict of interest for the Supplier.

|  |  |
| --- | --- |
| Category | *Please give details of the interest and whether it applies to yourself or, where appropriate, a member of your immediate family or some other close personal connection.* |
| Have you or any member of your staff working on this project had any previous employment (staff or Contractor) with TEC Partnership? |  |
| Do you have a financial interest in TEC Partnership? |  |
| Are you a member of any professional bodies, special interest groups or mutual support organisations that are linked to TEC Partnership? |  |
| Do you have any investments in unlisted companies, partnerships and other forms of business, major shareholdings and beneficial interests with TEC Partnership? |  |
| Have you/your Company offered any gifts or hospitality to any staff members of the TEC Partnership in the last twelve months and was it declined or accepted? |  |
| Are you aware of any other conflicts that are not covered by the above? |  |

To the best of my knowledge, the above information is complete and correct. I undertake to update as necessary the information provided, and to review the accuracy of the information on any change in supplier or sub-Contractor for the duration of this tender.

Signed:………………………………………… Company Name:…………………………………………………

Position:……………………………………… Date:……………………………………………

*Original copies of this document to be kept with tender returns or quotes by the Purchasing Team and made available for audit by request to the Purchasing Manager.*

**Section 3 – Due Diligence**

|  |  |  |
| --- | --- | --- |
| * 1. **Supplier Details** | | |
| Full name of the Supplier completing the ITT |  | |
| Registered Company Address: |  | |
| Registered company number |  | |
| Registered charity number |  | |
| Registered VAT number |  | |
| Name of immediate parent company |  | |
| Name of ultimate parent company |  | |
| Please mark ‘X’ in the relevant box to indicate your trading status | i) a public limited company | Yes |
| ii) a limited company | Yes |
| iii) a limited liability partnership | Yes |
| iv) other partnership | Yes |
| v) sole trader | Yes |
| vi) other (please specify) | Yes |
| Please mark ‘X’ in the relevant boxes to indicate whether any of the following classifications apply to you | i) Voluntary, Community and Social Enterprise (VCSE) | Yes |
| ii) Small or Medium Enterprise (SME) | Yes |
| iii) Sheltered workshop | Yes |
| iv) Public service mutual | Yes |

|  |  |
| --- | --- |
| **1. 2 Bidding Model** | |
| Please mark ‘X’ in the relevant box to indicate whether you are; | |
| a) Bidding as a Prime Contractor and will deliver 100% of the key contract deliverables yourself | Yes |
| b) Bidding as a Prime Contractor and will use third parties to deliver some of the services  If yes, please provide details of your proposed bidding model that includes members of the supply chain, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for. | Yes |
| c) Bidding as Prime Contractor but will operate as a Managing Agent and will use third parties to deliver all of the services  If yes, please provide details of your proposed bidding model that includes members of the supply chain, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for. | Yes |
| d) Bidding as a consortium but not proposing to create a new legal entity.  If yes, please include details of your consortium in the next column and use a separate Section to explain the alternative arrangements i.e. why a new legal entity is not being created.  Please note that the TEC Partnership may require the consortium to assume a specific legal form if awarded the contract, to the extent that it is necessary for the satisfactory performance of the contract. | Yes  Consortium members  Lead member |
| e) Bidding as a consortium and intend to create a Special Purpose Vehicle (SPV).  If yes, please include details of your consortium, current lead member and intended SPV in the next column and provide full details of the biding model using a separate Section. | Yes  Consortium members  Current lead member  Name of SPV |

|  |  |
| --- | --- |
| **1.3 Relevant experience and contract examples** | |
|  | Please provide details of up to three contracts, in any combination from either the public or private sector, that are relevant to the TEC Partnership’s requirement. Contracts for supplies or services should have been performed during the past three years.  The named customer contact provided should be prepared to provide written evidence to the TEC Partnership to confirm the accuracy of the information provided below.  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 will be created for this contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or Special Purpose Vehicle (three examples are not required from each member).  Where the Supplier is a Special Purpose Vehicle, 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 principal intended provider(s) or sub-contractor(s) who will deliver the supplies and services. |

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| **Contract 1** | | | |
| Name of customer organisation |  | Point of contact  Position  Email address |  |
| Contract start/end date |  | Estimated contract value |  |
| In no more than 500 words, please provide a brief description of the contract delivered including evidence as to your technical capability in this market |  | | |
| **Contract 2** | | | |
| Name of customer organisation |  | Point of contact  Position  Email address |  |
| Contract start/end date |  | Estimated contract value |  |
| In no more than 500 words, please provide a brief description of the contract delivered including evidence as to your technical capability in this market |  | | |
| **Contract 3** | | | |
| Name of customer organisation |  | Point of contact  Position  Email address |  |
| Contract start/end date |  | Estimated contract value |  |
| In no more than 500 words, please provide a brief description of the contract delivered including evidence as to your technical capability in this market |  | | |
| **If you cannot provide at least one example of questions 1 to 4, in no more than 500 words please provide an explanation for this e.g. your organisation is a new start up.** | | | |
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| **1.4 Minimum Organisaitonal Standards and Qualification** | | |
|  | To ensure you meet the minimal organisational standards and qualification the TEC Partnership require the following questions to be answered (self certify). You do not need to provide evidence at this stage. Checks will only be carried out on the winning supplier/contractor at award stage. Responses will be evaluationed on a pass/fail basis instead of being scored/weighted.  Please self – certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the requirements indicated below | |
| **1.** | **\*\***Refcom Registration | Yes  No |
| **2.** | **\*\*** F Gas Certification | Yes  No |
| **3.** | A relevant industry recognised Health and Safety Accreditation | Yes  No |
| **4.** | Employees hold relevant industry qualifications and registrations | Yes  No |
| **5.** | Training records are held by the employer | Yes  No |
| **6.** | Enhanced DBS | Yes  No |

**To comply with the Public Contract Regulations 2015 the TEC Partnership only requires the following questions to be answered (self-certify). You do not need to provide evidence at this stage. Checks against each module will only be carried out on the winning supplier/contractor at award stage. Responses will be evaluated on a pass/fail basis instead of being scored/weighted.**

**Insurance**

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| **1** | Please self – certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated below:  Employer’s (Compulsory) Liability Insurance = £5m  Public Liability Insurance = £5m  Professional Indemnity - £1m  “It is a legal requirement that all companies hold Employer’s (Compulsory) Liability Insurance of £5million as a minimum. Please note that this requirement is not applicable to Sole Traders. | Yes  No |

**Compliance with equality legislation**

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| --- | --- | --- |
| For organisations working outside of the UK please refer to equivalent legislation in the country that you are located. Please self – certify | | |
| **1** | In the last three years, has any finding of unlawful discrimination been made against your organisation by an Employment Tribunal, an Employment Appeal Tribunal or any other court (or in comparable proceedings in any jurisdiction other than the UK)? | Yes  No |
| **2** | In the last three years, has your organisation had a complaint upheld following an investigation by the Equality and Human Rights Commission or its predecessors (or a comparable body in any jurisdiction other than the UK), on grounds or alleged unlawful discrimination?  If you have answered “yes” to one or both of the questions in this module, please provide, as a separate Section, a summary of the nature of the investigation and an explanation of the outcome of the investigation to date.  If the investigation upheld the complaint against your organisation, please use the Section to explain what action (if any) you have taken to prevent unlawful discrimination from reoccurring.  You may be excluded if you are unable to demonstrate to the TEC Partnership’s satisfaction that appropriate remedial action has been taken to prevent similar unlawful discrimination reoccurring. | Yes  No |
| **3** | If you use sub-contractors, do you have processes in place to check whether any of the above circumstances apply to these other organisations? | Yes  No |

**Environmental Management**

Please self – certify

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| --- | --- | --- |
| 1 | Has your organisation been convicted of breaching environmental legislation, or had any notice served upon it, in the last three years by any environmental regulator or Group (including local Group)?  If your answer to this question is “Yes”, please provide details in a separate Section of the conviction or notice and details of any remedial action or changes you have made as a result of conviction or notices served.  The TEC Partnership will not select bidder(s) that have been prosecuted or served notice under environmental legislation in the last three years, unless the TEC Partnership is satisfied that appropriate remedial action has been taken to prevent future occurrences/breaches. | Yes  No |
| 2 | If you use sub-contractors, do you have processes in place to check whether any of these organisations have been convicted or had a notice served upon them for infringement of environmental legislation? | Yes  No |

**Health & Safety**

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| --- | --- | --- |
| 1 | Please self-certify that your organisation has a Health & Safety Policy that complies with current legislative requirements. | Yes  No |
| 2 | Has your organisation or any of its Directors or Executive Officers been in receipt of enforcement/remedial orders in relation to the Health and Safety Executive (or equivalent body) in the last three years?  If your answer to this question was “Yes”, please provide details in a separate Section of any enforcement/remedial orders served and give details of any remedial action or changes to procedures you have made as a result.  The TEC Partnership will exclude bidder(s) that have been in receipt of enforcement/remedial action orders unless the bidder(s) can demonstrate to the TEC Partnership’s satisfaction that appropriate remedial action has been taken to prevent future occurrences or breaches. | Yes  No |
| 3 | If you use sub-contractors, do you have processes in place to check whether any of the above circumstances apply to these other organisations? | Yes  No |

**Modern Slavery Act Statement**

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| --- | --- | --- |
| 1 | Please self-certify that your organisation warrants that it has thoroughly investigated its labour practices and those of its direct suppliers to ensure that there is no slavery or forced labour used anywhere in its organisation or used in any of its direct suppliers’ or subcontractors’ organisation. The supplier further warrants that it has put in place all necessary processes, procedures, investigations and compliance systems to ensure that the warranties made above will continue to be the case at all times. | Yes  No |

**Section 4 – Scoring Criteria**

| **Score %** | **Score** | **4**  Meets all expectations. Demonstrates complete understanding of all the requirements of the specification | **3**  Meets most expectations. Demonstrates good understanding of most of the requirements of the specification | **2**  Meets some expectations. Response is standardised with no apparent understanding of the requirements of the specification | **1**  Does not meet expectations. Response is weak & does not adequately address the specification | **0**  Response is missing. Response is very weak and does not address the specification. |
| --- | --- | --- | --- | --- | --- | --- |
| 50% | Fee proposal | Most economically advantageous | Economically advantageous | Economically advantageous | Least economically advantageous | Response is missing. |
| 40% | Service Offer | Confirmation and detailed evidence in return considering work planning & communication with the PPM Manager  Confirmation and full description of how to support the process of issuing works, receiving job sheets in a timely manner. Statement that invoices submitted correctly and in a timely manner.  Full description & commitment to update Partnership asset information in the format agreed with the Partnership.  Reference to procedures in place for safety systems and examples provided.  No element of requirement sub-contracted. | Confirmation and evidence in return considering work planning & communication with the PPM Manager.  Confirmation and description of how to support the process of issuing works, receiving job sheets in a timely manner. Statement that invoices submitted correctly and in a timely manner.  Description & commitment to update Partnership asset information in the format agreed with the Partnership  Some procedures in place for safety systems not all provided.  Sub-contracts part of the works.. | Confirmation in return considering work planning & communication with the PPM Manager.  Confirmation and some description of how to support the process of issuing works, receiving job sheets in a timely manner. Statement that invoices submitted correctly and in a timely manner.  Description & commitment to update Partnership asset information in the format agreed with the Partnership.  Few procedures in place for safety systems poor detail on examples.  Sub-contracts most of the works | Lacks detail return for considering work planning & communication with the PPM Manager.  Some description of how to support the process of issuing works, receiving job sheets in a timely manner. Statement that invoices submitted correctly and in a timely manner  Procedures in place for safety systems but no examples.  Sub contracts most of the work | Response is missing. Response is very weak and does not address the specification. |
| 10% | Relevant Experience | Contractor successfully delivered similar contract.  Clear evidence provided of delivery on time and with excellent evidence of team collaboration and management. | Contractor successfully delivered similar contract.  Some evidence provided of delivery on time and with good evidence of team collaboration and management. | Contractor successfully delivered similar contract but not the same.  Limited evidence provided of delivery on time and of team collaboration and management. | Contractor not delivered similar contract.  Limited description of delivery methods but not specific enough. | Response is missing. Response is very weak and does not address the specification. |

**Section 5 - Details of documents appended to this ITT**

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| **Number** | **Document** |
| **01** | TEC Partnership - Site List |
| **02** | Air Conditioning Service - Asset List |
| **03** | Air Conditioing Service Submission Checklist |
| **04** | Terms and Conditions |
| **05** | Contractors Handbook |