Rutland county Council

**Tender for**

**HOME IMPROVEMENT AGENCY SERVICE (HIA)**

**Tender DOCUMENT One**

**Information and Instructions**

Thank you for expressing interest in this procurement.

We now invite you to submit a tender. Further stages of the process are outlined in this document.

To assist you in this four documents have been provided:

* Document One – Information and instructions (including the timetable) (this document)
* Document Two –Specification
* Document Three – General Terms and Conditions
* Document Four – Tender Response Document

When completed, please submit Document Four - Tender Response Document via the e-tender portal no later than the deadline for bids.

|  |
| --- |
| **To be submitted by no later than noon Friday 22nd June 2018**  **Late submissions will be disregarded.** |

Please ensure that you register your interest via the e-tender portal in order to receive updates, questions and responses and to enable you to submit your bid

**Please monitor your mailbox and spam folder for messages sent via the e-portal**

[**https://www.eastmidstenders.org**](https://www.eastmidstenders.org/)

**TENDER – DOCUMENT ONE**

**INFORMATION AND INSTRUCTIONS**

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1. **Introduction**

**1.1 How this tender is structured**

This tender is arranged in four sections:

**Document One**, this document contains instructions on how to respond to the Invitation to Tender; gives an indication of the timetable being followed; provides bidders with details of the scoring, criteria and weightings which will be used to evaluate bids, and details of how and when to return the Tender Response Document (Document Four).

**Document Two** contains the detailed Specification for the goods or services required.

**Document Three** contains the General Terms and Conditions which apply to this tender and to the ensuing contract(s).

**Document Four** is the Tender Response Document which has to be completed according to the instructions and returned as instructed no later than the deadline for bids.

* 1. **The commissioning background and the requirement**

1. This contract is issued by Rutland County Council (the Council).
2. In view of the size of the contract the Welland Procurement Service (a shared procurement service representing the Council) is supporting the conduct of this procurement.
3. In compliance with the Public Contract Regulations 2015 for public contract opportunities that are advertised with a value of £181,302 or more, it has been decided to use a single stage/open tender process.
4. This means that the tender response document combines the Standard Selection Questionnaire (SSQ), a set of Tender Evaluation Questions, Pricing Schedule, a Form of Tender, a Collusive Tendering Certificate and a Confidential and Commercially Sensitive Information form.
5. The Council, as the contract holder, requires that the process of awarding this contract(s) is to involve the circulation of the tender documentation to locally known suppliers who may have the right experience, and advertising on OJEU, Contracts Finder and Source East Midlands.
6. The eventual contract between the successful bidder and the Council will consist of the following documents:
   1. Documents 1 to 3 of this tender developed by the Council.
   2. Document 4 of this tender – the Response document completed by the Bidder.
   3. ‘Letter of Acceptance’ confirming the conditions of acceptance of the tender.

Requirement

1. Rutland County Council (the Council) requires a Home Improvement Agency Service.
2. The Council wishes to link housing, health and social care strategies and to develop a more unified approach to the provision of housing Services for vulnerable, older and disabled people, regardless of tenure.
3. The overall aim of the Service is to deliver housing related support Services, specifically home improvement agency services, to enable Service Users to develop or maintain their independence within the community. These Services aim to support independence in the home environment.
4. The Service operates across the county of Rutland.
5. The Service will be a single access point into a range of practical housing support solutions with a common, holistic housing needs assessment process.
6. The Service will provide:

* A Housing MOT using a trusted assessor to assess both the property and persons needs and enable a timely preventative response
* Source and arrange installation of minor adaptations to the home environment
* Where a possible need for a Health and Prevention Grant is identified refer to the Council for an Occupational Therapist assessment
* Provide a handyman and maintenance Service
* Signposting

1. The proposed Contract length is 3 years, with the option to extend annually for a further 3 years. This will be subject to annual review. The maximum contract period will be 6 years.
2. The budget for the provision of the core Service is £53,000 per year. Data for the number of referrals in the previous six months is as follows: 110 received, 87 completed.
3. Up to a further £35,000 per annum is available in a separate budget for the minor aids equipment. Data for the minor aids equipment in the previous twelve months is as follows: 290 Service Users visited; 454 jobs completed.

Quantity of Minor Adaptations fitted:

|  |  |
| --- | --- |
| Item | Quantity over Jan 17-Dec 17 |
| Raisers |  |
| Chairs/Beds/Sofas |  |
| 4 legs | 15 |
| 5 legs | 3 |
| 6 legs | 1 |
| Stair Rails |  |
| Per Metre | 135m |
| Grab Rails (+ £X for plastic rails) |  |
| Fixed Flanged |  |
| 30cm | 148 |
| 38cm | 1 |
| 46cm | 97 |
| 61cm | 39 |
| 80cm | 1 |
| Flat End |  |
| 46cm | 9 |
| 61cm | 3 |
| Newel Rails | 16 |
| Half step | 23 |
| Drop down rail | 2 |
| Key Safe |  |
| Small | 13 |
| Large | 1 |

1. Therefore the estimated Contract value over the lifetime of the Contract is £528,000 (i.e. £88,000 x six years).
2. The current Service has been provided as a pilot for 12 months before procuring the Service longer term.
3. The expiry date of the existing arrangement is 30th September 2018.
4. Bids are invited from suitably qualified, skilled and experienced providers of the specified services.

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**1.3 Procurement Timetable**

* + 1. The procurement is intended to follow the time-line below:

|  |  |  |
| --- | --- | --- |
|  | Prior Information Notice (PIN) published | Sat 14th April 2018 |
|  | OJEU Contract Notice - published no later than: | Thu 31st May 2018 |

|  |  |  |
| --- | --- | --- |
|  | Tender documents available | Fri 1st June 2018 |
|  | Deadline for clarification questions | Fri 15th June 2018 |
|  | Deadline for Submission of Tenders\* | Noon Fri 22nd June 2018 |
|  | Evaluation completed by | Tue 3rd July 2018 |
|  | Clarification meetings (if required) | Tue 17th July 2018 |
|  | Standstill Period | Tue 24th July 2018 to midnight Mon 6th Aug 2018 |
|  | Contract Awarded | Tue 7th Aug 2018 |
|  | Contract Start | Mon 1st Oct 2018 |

\*timescale shortened within that availablefor an Open Procedure under Reg. 27 (4) following publication of both the relevant form of Prior Information Notice and Contract Notice

1.3.2 The Council reserves the right to amend this timetable and steps 4, 5, 6, 7 and 8 are provided for indicative purposes only.

* + 1. Throughout the evaluation process, the Council reserves the right to seek clarifications from tenderers, where this is considered necessary to achieve a complete understanding of the bids received. In any event, should the evaluation panel, in its reasonable judgement, identify a fundamental failing or weakness in any tender then that tender may, regardless of its other merits, be excluded from further consideration.

**1.4 Instructions on responding to this tender**

1. Bidders shall treat the details of the tender document as private and confidential. However such information may be disclosed, as necessary, for the purpose of obtaining quotations or Insurance quotes.
2. All costs associated with the preparation and submission of the response to this Invitation to Tender shall be borne in full by the Bidders. The Council will not be liable, under any circumstances, for any costs or charges incurred in submitting a tender or for the preparation of the Contract with the successful Bidder.
3. The Form of Tender and the Collusive Tendering Certificate in the tender document must be signed by the Bidder. The Confidential and Commercially Sensitive Information form must be completed. The whole document (Document Four) should be submitted via the e-tender portal.
4. Any recommendations, reservations or comments pertaining to the information included in the Invitation to Tender documents should be clearly stated.
5. No unauthorised alterations or additions should be made to the Form of Tender, Collusive Tendering Certificate or to any other component of the tender document.
6. Tenders must not be qualified but must be submitted strictly in accordance with the tender documents. Bidders must not make unauthorised changes to tender documents.
7. Bidders may submit (an) alternative bid(s); but must also submit a conforming bid.
8. The tender submission should include all the information which the Bidder feels necessary for an accurate and equitable evaluation of their proposal. Reference should not be made to previously submitted information and all aspects of the tender request are to be addressed. The submission is to be self contained. The Bidder should not rely on the Council’s past experience as tender evaluations will be based only on the information contained within the submission.
9. Bidders will not be allowed to alter their tenders after the closing date, except that arithmetical errors may be corrected.
10. Any queries arising from the tender documents which may have a bearing on the offer to be made should be raised with the Council’s contact via the e-tender portal ([Section 7](#Contacts)) as soon as possible and in any case by the deadline for questions in the timetable.
11. Tenders and supporting documents must be written in English. Any mistakes or alterations should be initialled by the tenderer.
12. Bidders should note that the tender document may include a requirement for element(s) of the goods or services to be completed by a certain date as shown.
13. Tenders should be submitted via the e-tender portal no later than the date and time stated on the front of this document. Late tenders will not be considered. Fax and email submissions (emailed direct to the Council), will not be considered even if received before the date indicated.
14. n/a
15. Bidders must hold their tender open for acceptance for a minimum of ninety (90) days from the date of opening.
16. The Council does not bind itself to accept the lowest or any tender.

**2. PROCUREMENT APPROACH**

1. This is a single stage/open tender process, this being the Invitation to Tender. You may ask questions in writing via the e-tender portal regarding the tender documents or the details of the goods or service required.
2. Where questions raise an issue of general interest or clarification then the question and answer will be circulated to all Bidders. The identity of the originator will not be disclosed.
3. Once the deadline for receipt of tenders has been reached, the Council will evaluate the written tenders. The Standard Selection Questionnaire will be assessed first, as Bidders who do not meet the Council’s expectations may be excluded. Suppliers who self certify that they meet the requirements for insurance, economic and financial standing and technical and professional ability will be required to provide evidence of this if they are successful at contract award stage.
4. The responses to the evaluation questions will then be scored and weighted as explained in [Sections 3](#Scoring) , [4](#CriteriaforPQQ) and [5](#CriteriaforTenders) below.
5. Once the submitted bids have been evaluated, the Council reserves the right to hold clarification meetings with no fewer than the top two or three highest scoring bidders. No new criteria will be introduced at these meetings, rather on the basis of these meetings the Council may choose to revise a bidder’s score for each response to an evaluation question, either up or down, to reach a final score.
6. The Council will then make its award decision, if appropriate.
7. The procurement timetable is detailed in section 1.3 above, and the tender evaluation process is shown below.
8. The process is subject to the completion of formal contract documents.

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**3** **SCORING**

**3.1 Non-Price Scoring**

Each written tender will be scrutinised by a small panel and each scoring criteria (Section [5](#CriteriaforTenders) below) will be awarded points out of 10 according to the following scale.

| **Score** | **Criteria for awarding score** |
| --- | --- |
| 0 | No response or response is unacceptable |
| 1 | Response is very weak and almost unacceptable, and/or is inconsistent or in conflict with other responses |
| 2 | Response is weak, and falls well below expectations in a number of respects |
| 3 | Response is weak and is below expectations, not meeting the required standard in most respects, and/or is lacking/ inconsistent in others |
| 4 | Response is below expectations but meets the required standard in some respects |
| 5 | Response meets expectations regarding the required standard |
| 6 | Response slightly exceeds expectations regarding the required standard |
| 7 | Response is good and is well above expectations in some respects |
| 8 | Response is very good and is well above expectations in most respects |
| 9 | Response is outstanding and meets the required standard in all respects and exceeds some or all of the major requirements |
| 10 | Response is exceptional and meets the required standard in all material respects and exceeds all the major requirements, and represents significant added value |

The weighting available for a score of 10 points is shown below in Section 5, and a pro rata weighting will be applied to the score.

**3.2 Price Scoring**

The tendered will be converted into points by applying the formula:

Lowest price bid divided by tenderer’s price multiplied by 100% of the allocated weighting for price

For example, if the tenderer’s price is £100, and this is also the lowest price, the calculation is:

100 x 100% = 100% of the allocated weighting for price

100

A bid of £200 would be calculated as:

100 x 100% = 50% of the allocated weighting for price

200

For example:

Bid 1 £100 = Lowest bid

Bid 2 £150

Bid 3 £200

Allocated weighting for price = 30%

Lowest bid £100 = 1.00 x 30 = 30.00%

Bid 1 £100

Lowest bid £100 = 0.67 x 30 = 20.00%

Bid 2 £150

Lowest bid £100 = 0.50 x 30 = 15.00%

Bid 3 £200

**4** **CRITERIA FOR ASSESSING STANDARD SELECTION QUESTIONNAIRE**

The Public Contract Regulations 2015 came into force on 26th February 2015, in compliance with those regulations – this is a single stage/open tender process.

Local authorities must assess a Bidder’s suitability to deliver the requirements as stated in the Specification/Contract. Those bidders who satisfy the selection assessment will have their tenders evaluated. Those who do not will be excluded from the process. The selection process is based on a template document issued by Central Government. Many of the selection questions will be the same for every tender but some may be specific to the subject matter of the contract. Please see below for further details about the evaluation of the Standard Selection Questionnaire.

| **Question**  **No.** | **Section Headings and Sub-Headings** | **Maximum Available Section Score** | **Weighting Within Sub-Heading** |
| --- | --- | --- | --- |
| **1.1**   * 1. (a)   1.1 (b) (i)  1.1 (b) (ii)  1.1 (c)  1.1 (d)  1.1 (e)  1.1 (f)  1.1 (g)  1.1 (h)  1.1 (i) (i)  1.1 (i) (ii)  1.1 (j) (i)  1.1 (j) (ii)  1.1 (k)  1.1 (m)  1.1 (n)  1.1 (o)  1.1 (p) | **Potential Supplier Information**  Full name  Registered office  Registered website address  Trading status  Date of registration  Company registration number  Charity registration number  Head Office DUNS number  Registered VAT number  Appropriate professional/trade registration  If yes, details  Legal required for professional/trade registration  If yes, details  Relevant classifications  SME  Persons of Significant Control  Details of immediate parent company  Details of ultimate parent company | 0% | 0% |
| **1.2**  1.2 (a) (i)   * 1. (a) (ii)   2. (a) (iii)   1.2 (b) (i)  1.2 (b) (ii) | **Bidding Model**  Bidding as lead contact for a group of economic operators  Name of group of economic operators  Proposed legal structure  Use of sub contractors  Sub Contractor details | 0% | 0% |
| **1.3**  1.3 (a)-(h) | **Contact Details and Declaration**  Details completed | 0% | 0% |
| **2**  2.1 (a)  2.1 (b) | **Grounds for Mandatory Exclusion**  Regulations 57(1) and (2):  Criminal organisation  Corruption  Fraud  Terrorist offences  Money laundering  Child labour/human trafficking  Breach of environmental obligations  Breach of social obligations  Breach of labour obligations  Bankrupt/insolvency or winding-up proceedings  Grave professional misconduct  Agreements with other economic operators to distort competition  Conflict of interest  Preparation of procurement procedure  Early termination of contract /damages/comparable sanctions  In breach of obligations re: tax/social security contributions  Measures taken | Pass/Fail | Pass/Fail |
| 2.2 | Self cleaning measures | Pass/Fail | Pass/Fail |
| 2.3 (a)  2.3 (b) | Breach of tax/social security obligations  If yes, further details | Pass/Fail | Pass/Fail |
| **3**  3.1 (a)  3.1 (b)  3.1 (c)  3.1 (d)  3.1 (e)  3.1 (f)  3.1 (g)  3.1 (h)  3.1 (i)  3.1 (j)  3.2 | **Grounds for Discretionary Exclusion**  Regulation 57 (8)  Breach of environmental obligations  Breach of social obligations  Breach of labour obligations  Financial administration  Guilty of grave professional misconduct  Distorting competition  Conflict of interest  Involved in preparation of procurement  Significant or persistent deficiencies  Statement response  If yes, self cleaning | Pass/Fail | Pass/Fail |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question**  **No.** | **Section Headings and Sub-Headings** | Maximum Available Section Score | Weighting Within Sub-Heading |
| **4 and 5**  4.1  4.2  5.1  5.2  5.3 | **Economic and Financial Standing**  Audited accounts or alternative means of demonstrating financial status  Minimal financial threshold (if stated)  Parent company accounts  Parent company guarantee  Bank guarantee | Pass/Fail | Pass/Fail |
| **6**  6.1  6.2 | **Technical and Professional Ability**  Details of up to three contracts  Evidence of healthy supply chains maintained with sub-contractors  Sub contract supply chain management | Pass/Fail | Pass/Fail |
| **7**  7.1  7.2 | **Requirements under Modern Slavery Act 2015**  Relevant commercial organisation (UK business with turnover >£36m)  Compliant with annual reporting requirements | Pass/Fail | Pass/Fail |
| **8** | **Additional Questions:** |  |  |
| **8.1** | **Insurance** | Pass / Fail | Pass/Fail |
| **8.2**  (a)  (b)  (c)  (d)  (e)  (f)  (g)  (h)  (i)  (j)  (k) | **Health and Safety**  Formal health and safety policy/statement  Accredited health and safety system  Responsible person for health and safety policy  Health and safety professional/consultant  Health and safety training (staff/sub-contractors)  Accident records  Staff consultation on health and safety matters  Risk assessments  Investigated / prosecuted for health and safety offence  Civil action for health and safety offence  Prohibition / improvement notices for breaches of health and safety legislation | Pass/Fail | Pass/Fail |
| **8.3**  (a) | **Environmental Management**  Policy re: safe management of the environment | Pass/Fail | Pass/Fail |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question**  **No.** | **Section Headings and Sub-Headings** | Maximum Available Section Score | Weighting Within Sub-Heading |
| **8.4**  (a)  (b)  (c)  (d) | **Equal Opportunities**  Compliant policy  Findings of unlawful discrimination / harassment  Investigated by the Equality and Human Rights Commission  Complaints procedure | Pass/Fail | Pass/Fail |
| **9.0** | **Qualifications** |  |  |
| **9.1** | Trusted Assessor – Installations  &  HNC Construction | Pass/Fail | Pass/Fail |
| **10.0** | **DBS Checks** |  |  |
| **10.1** | Enhanced disclosureincluding a check against the adults’ and childrens’ barred lists | Pass/Fail | Pass/Fail |
|  |  |  |  |

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**5** **CRITERIA FOR ASSESSING TENDER RESPONSES**

Only those Bidders which pass the Standard Selection Questionnaire (SSQ), will have their tenders evaluated using this scheme.

| **Criteria** | **Maximum Score Available %** | **Weighting Within Sub Criteria (if any) %** |
| --- | --- | --- |
| **Quality** |  |  |
| **1 Service Model** | 70% | 14% |
| **2 Service Characteristics** | 14% |
| **3 Outcomes** | 14% |
| **4 Staffing** | 7% |
| **4 Safeguarding** | 7% |
| **6 Service User Engagement** | 10% |
| **7 Social Value** | 4% |
| **(Sub-total)** | (70%) |
| **\* Price (exclusive of VAT)** |  |  |
| Annual Service cost  +  Aids and Adaptations Price Schedule | 30% | 30% |
| **Total** | **100%** | **100%** |

**\*** Please note that the lowest cost tender will receive the highest mark in the Price sub-heading, all other tenders will receive a pro rata score based on that lowest price (See: 3.2 Price Scoring).

**6.** **INVITATION TO TENDER**

When completed, please submit your completed Document Four - Response document via the e-tender portal **no later than the stated deadline.**

7. CONTACT

In the event of any queries or requests for further information arising from this tender, please submit your questions **via the e-tender portal**

***Note that the Council cannot accept the return of completed tender responses by e-mail direct to the Council. Tenders must be submitted via the e-tender portal.***

**Responses to questions - clarifications**

If the Council considers any question or request for clarification to be of material significance, both the query and the response will be communicated, in a suitably anonymous form, to all providers / suppliers who have responded.

***Please ensure you monitor your inbox and spam filter for messages generated by the e-tender portal regarding the tender.***

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