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Request For Quotation

Health Impact Assessment

Cherwell Local Plan Review

Project Number I-1524

Closing date for return of RFQ

12 Noon 25th October 2021

**You must read the Request for Quotation and Conditions of Contract before completing this pack.**

**Tenderers must answer all questions in this document**

**PART B – REQUEST FOR QUOTATION**

SECTION A MANDATORY CRITERIA (PHASE 1)

A1 BIDDER INFORMATION

|  |  |
| --- | --- |
| **A1.1 Bidder details** | **Answer** |
| Full name of the Bidder completing the RFQ  | Click or tap here to enter text. |
| Registered company address | Click or tap here to enter text. |
| Registered company number | Click or tap here to enter text. |
| Registered charity number | Click or tap here to enter text. |
| Registered VAT number | Click or tap here to enter text. |
| Name of immediate parent company | Click or tap here to enter text. |
| Name of ultimate parent company | Click or tap here to enter text. |
| Please mark ‘X’ in the relevant box to indicate your trading status | Choose an item. |
| If other, please specify | Click or tap here to enter text. |
| 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 – defined as a non-governmental organisation that is value-driven and which principally reinvests its surpluses to further social, environmental or cultural objectives.) |[ ]
|  | ii) Small or Medium Enterprise (SME)  |[ ]
|  | iii) Sheltered workshop |[ ]
|  | iv) Public service mutual |[ ]

|  |
| --- |
| **A1.2 Contact details** |
| Bidder contact details for enquiries about this RFQ |
| Name | Click or tap here to enter text. |
| Postal address | Click or tap here to enter text. |
| Country | Click or tap here to enter text. |
| Phone | Click or tap here to enter text. |
| Mobile | Click or tap here to enter text. |
| E-mail | Click or tap here to enter text. |

A2 MANDATORY REJECTION CRITERIA

|  |  |
| --- | --- |
| **Has it been established 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 your organisation is established (if outside the UK), that your organisation is in breach of obligations related to the payment of tax or social security contributions?**If you have answered Yes to this question, please provide further details. Please confirm whether you have paid, or have entered into a binding arrangement with a view to paying, including, where applicable, any accrued interest and/or fines? | Choose an item. |
| Details:Click or tap here to enter text. |

A3 DISCRETIONARY REJECTION CRITERIA

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| Does your organisation have a conflict of interest?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.  | Choose an item. |
| Details:Click or tap here to enter text. |

A4 MANDATORY CRITERIA

Suppliers who self-certify that they meet the requirements to these additional questions will be required to provide evidence of this if they are successful at contract award stage.

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| **4.1 Insurance** |
| 4.1.1 | 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 = £10 millionPublic Liability Insurance = £5 million Please note that your Public Liability insurance should cover sudden & unforeseen pollution-type of eventsProfessional Indemnity Insurance = £5 million \*It is a legal requirement that all companies hold Employer’s (Compulsory) Liability Insurance of £5million as a minimum. Please note this requirement is not applicable to Sole Traders. | Choose an item. |
| **4.2 Equality & Diversity** |
| 4.2.1 | Do you have an Equality & Diversity Policy?The Equality Act 2010 provides protection from unlawful discrimination for people with the following protected characteristics: Age Disability Sex Gender reassignment and gender identity Marriage and civil partnership Pregnancy and maternity Race – this includes ethnic or national origins, colour or nationality Religion or belief – this includes lack of belief Sexual orientation | Choose an item. |
| 4.2.2 | Please detail any finding of unlawful discrimination that has been made by any court or industrial or employment tribunal in the last 3 years? |
| Details:Click or tap here to enter text. |
| **4.3 Safeguarding** |
| 4.3.1 | Do you agree to adopt the Council’s Safeguarding principles and standards throughout your organisation as part of your normal operating practice? Link to [Adults Safeguarding Procedures](http://www.osab.co.uk/professionals/multi-agency-procedures/)[Children's Safeguarding Procedures](http://www.oscb.org.uk/inter-agency-procedures/) | Choose an item. |
| 4.3.2 | Please detail any safeguarding issues you have had in the last 3 years. |
| Details:Click or tap here to enter text. |
| **4.4 Health & Safety – N/A** |
| 4.4.1 | Do you have a health and safety policy? | Choose an item. |
| 4.4.2 | a) Do you have a documented system in place for recording and investigating Health & Safety Incidents?  | Choose an item. |
| 4.4.3 | b) Do you have a process to analyse data to identify trends and to use this to improve?  | Choose an item. |
| 4.4.4 | Please provide details of any breach of the Health & Safety Act or of any improvement/prohibition notice by the Health & Safety Executive (HSE) during the last 3 years. |
| Details:Click or tap here to enter text. |
| **4.5 Data Protection (N/A)** |
| 4.5.1 | Do you comply with all the relevant articles of the General Data Protection Regulations (GDPR)? In particular have you updated your practices, policies and procedures (if necessary) to ensure their effectiveness in recording and demonstrating compliance with the GDPR?*NB: please note the successful Bidder(s) will be asked to provide evidence of compliance in the form of a questionnaire.* | N/A |
| 4.5.2 | Will data owned by the Council, or that the Council is responsible for at law, be held inside and not transferred outside the UK? If so, where will it be held? | N/A |
| 4.5.3 | Have you had any data protection or information security breaches in the last 3 years? If yes, please provide details of any remedial action or changes to procedures as a result.*NB: the Council will exclude Bidders who are unable to demonstrate to the Council’s satisfaction that appropriate remedial action has been taken to prevent further occurrences* | N/A |
| Details:Click or tap here to enter text. |
| **4.6 Environmental Management** |
| 4.6.1 | 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 authority (including local authority)? If your answer to this question is “Yes”, please provide details in a separate Appendix 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 Council will not select bidder(s) that have been prosecuted or served notice under environmental legislation in the last 3 years, unless the Council is satisfied that appropriate remedial action has been taken to prevent future occurrences/breaches. | Choose an item. |
| Details: |
| 4.6.2 | If you use subcontractors, 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? | Choose an item. |

A5 TECHNICAL ABILITY

Please provide details of up to 3 contracts performed during the past 3 years that are relevant to the scope of this contract and demonstrate your experience in providing the Services covered by this RFQ. Although the information you provide will not be scored as part of this RFQ process, the Council may wish to use it in order to verify your relevant experience and capability. Please note therefore that the customer contact should be prepared to confirm the accuracy of the information provided should the Council wish to contact them.

**For each contract** please provide the following information:

|  |  |
| --- | --- |
| Customer organisation name | Click or tap here to enter text. |
| Customer contact name, position in organisation, phone number and email address | Click or tap here to enter text. |
| Contract start date Contract completion date Estimated Contract Value | Click or tap here to enter text. |
| Brief description of contract (max 150 words  | Click or tap here to enter text. |

|  |  |
| --- | --- |
| Customer organisation name | Click or tap here to enter text. |
| Customer contact name, position in organisation, phone number and email address | Click or tap here to enter text. |
| Contract start date Contract completion date Estimated Contract Value | Click or tap here to enter text. |
| Brief description of contract (max 150 words  | Click or tap here to enter text. |

|  |  |
| --- | --- |
| Customer organisation name | Click or tap here to enter text. |
| Customer contact name, position in organisation, phone number and email address | Click or tap here to enter text. |
| Contract start date Contract completion date Estimated Contract Value | Click or tap here to enter text. |
| Brief description of contract (max 150 words  | Click or tap here to enter text. |

**SECTION B SERVICE QUESTIONS (PHASE 2) [60%]**

Please describe how you propose to deliver the Services described in Appendix 1 Specification:

There are five key Service Questions, and each will be given a score out of 10. This score will represent the overall score for the response to the sub-questions. The sub-questions are not scored individually.

Please do not refer to separate documents or appendices unless requested in the question, as they will NOT be read.

The word count will be strictly enforced, any words over the word county will NOT be read.

Please use Arial Font size 12.

Answers should provide examples of experience that demonstrates your ability to deliver this Service.

|  |  |  |
| --- | --- | --- |
| 1, Local planning | What is your understanding of the project and the local planning context relevant to Cherwell District? | Weighting 10%Word Limit 500 Words |
| Insert Response here: |

|  |  |  |
| --- | --- | --- |
| 2, Methodology | What is your methodology, deliverables and timescales for each stage of the project? (please provide as separate document if necessary) | Weighting 25%Word Limit 2000 Words |
| Insert Response here: |

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| --- | --- | --- |
| 3. Programme & Project Management | What are your programme and project management arrangements?  | Weighting 5%Word Limit 500 Words |
| Insert Response here: |

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| --- | --- | --- |
| 4, Resources & Technical skills | What staff resource technical skills will you commit to the project? (please provide CVs). Are there any conflicts of interest on the part of any of the core team members?’ | Weighting 10%Word Limit 500 Words |
| Insert Response here: |

|  |  |  |
| --- | --- | --- |
| 5, Experience | What experience of other similar work does the project team have? (please provide at least 3 case studies, of which at least one should have been finalised and the plan examined in the last two years). | Weighting 10%Word Limit 500 Words |
| Insert Response here: |

**SECTION C PRICING SCHEDULE (PHASE 2) [40%]**

Please insert your quotation price for delivery of the Service set out in the Specification **excluding VAT** in GBP Sterling.

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| --- | --- |
| **Cost component description** |  **Costs (£)** |
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| **Total Costs (£) \*** | **£** |

\* You should identify all potential cost components anticipated in your delivery of the Services described in Appendix 1 Specification. No additional costs will be considered by the Council unless these are clearly stated in your Pricing Schedule response.

**SECTION D ECONOMIC & FINANCIAL STANDING (PHASE 3)**

Bidder’s financial stability will be assessed using Procurement Catalyst reports.

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| **Economic and Financial Standing** |
| D.1 | Further financial information will be requested in cases where Procurement Catalyst provides no report. Please select the information your organisation can provide to demonstrate financial standing: |
|  | 1. A copy of the audited accounts for the most recent two years
 |[ ]
|  | 1. A statement of the turnover, Profit and Loss Account/Income Statement, Balance Sheet/Statement of Financial Position and Statement of Cash Flow for the most recent year of trading for this organisation.
 |[ ]
|  | 1. A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position
 |[ ]
|  | 1. Alternative means of demonstrating financial status if any of the above are not available (e.g. forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status)
 |[ ]
| D.2 | Where we have specified a minimum level of economic and financial standing and/ or a minimum financial threshold within the evaluation criteria for this procurement, please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirement set out. | Choose an item. |

**Documentation should be ready to submit from 25th October 2021. Where Bidders are not able to provide the information set out in a or b, the value of the contract(s) awarded may be limited.**

All financial accounts and supporting information should wherever possible be in English and GBP Sterling. Where this is not possible, the Council will use an exchange rate for certain parts of its assessment of financial standing. The source of the exchange rate to be used and the rate itself will be notified to the Bidder by the Council at the time the assessment is made.

|  |
| --- |
| If you are part of a wider group, please provide further details below: |
| Name of organisation | Click or tap here to enter text. |
| Relationship to the Supplier completing these questions | Click or tap here to enter text. |

|  |  |  |
| --- | --- | --- |
| D.3 | Are you able to provide parent company accounts if requested to at a later stage? | Choose an item. |
| D.4 | If yes, would the parent company be willing to provide a guarantee if necessary? | Choose an item. |
| D.5 | If no, would you be able to obtain a guarantee elsewhere (e.g. from a bank)? | Choose an item. |

**SECTION E FORM OF QUOTATION**

Contract for Provision of a Health Impact Assessment for the Cherwell Local Plan Review

Reference I-1524

To Cherwell District Council

I/we the undersigned DO HEREBY OFFER to provide the Services upon and subject to the terms and conditions set out in such Contract Conditions, Specification, and the pricing and rates contained in the Pricing Schedule and other documents as are contained or incorporated herein. This offer remains valid and open for acceptance for three months.

The amount of my/our Bid has not been calculated by agreement or arrangement with any person other than the Council and that the amount of my/our Bid has not been communicated to any person until after the closing date for the submission of Bids and in any event not without the consent of the Council.

I/we have not and will not enter into any agreement or arrangement with any person that they shall refrain from bidding, that they shall withdraw or vary the amount of any Bid once offered or otherwise collude with any person with the intent of preventing or restricting full competition.

I/we have not canvassed and will not, before the evaluation process, canvass or solicit any member or officer, employee or agent of the Council in connection with the award of the Contract and that no person employed by me/us has done or will do any such act.

Signature ...............................................................

## Duly authorised for and on behalf of the Bidder

(Electronic/typed signatures are acceptable)

Position held ...............................................................

Name and Address ...............................................................

of Bidder

...............................................................

...............................................................

Dated ...............................................................

It must be clearly shown whether the Bidder is a Limited Company, Corporation, Partnership, or Single Individual, trading in his own or another name, and also if the person signing is not the actual Bidder, the capacity in which s/he signs or is employed.

**SECTION F BIDDER CHECKLIST & PRECONTRACT CHECKLIST**

Bidders should ensure that they have completed the following sections before returning their RFQ responses:

|  |  |
| --- | --- |
| **SECTION HEADING** | **COMPLETED?** |
| **Section A Mandatory Criteria** |[ ]
| **Section B Service Questions** | [ ]  |
| **Section C Pricing Schedule** |[ ]
| **Section D Economic & Financial Standing** |[ ]
| **Section E Form of Quotation** |[ ]

It is important that all sections are completed as failure to do so may result in your RFQ response not being considered.

Bidders who do not wish to provide a response to this RFQ are requested to advise the Council’s Representative as soon as possible.

**PRE-CONTRACT CHECKLIST**

Following evaluation, the following documents will be required by the Council from the Bidder(s) who has the Most Economic Advantageous Bid. These documents must be checked prior to contract and the Council is providing this list so Bidders can be prepared.

|  |  |
| --- | --- |
| **SECTION** | **SECTION HEADING** |
| **4.1** | **Insurance Certificates** |
| **4.2** | **Equality & Diversity Policy** |
| **4.3** | **Safeguarding Policy** |
| **4.4** | **Health & Safety Policy** |
| **6.1** | **PCI Compliance and/or other service specific questions** |
|  |  |