



Part 1 Information

Contract Reference

T00217ChS

Contract Title

Lot 1: Support for Torbay Governing Body Support Services.

Lot 2: Support for Ethnic Minority and Traveller Services.

Lot 3: Provision of an Adviser to Torbay Standing Advisory Council for Religious Education (SACRE).

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The Tender Documents can be made available in other formats. For further information please submit your request through the messaging facility on the Supplying the South West e-Tendering Portal

1 Availability of the Tender Documents

In order to give potential Applicants unrestricted, full, direct and free of charge access to the Tender Documents (***the Documents***) the Authority is providing the Documents in PDF format in the Opportunities Area of the Supplying the South West e-Tendering portal (***ProContract***).

In order to access amendable versions of the Documents and to submit a response Applicants must be registered on ProContract. Applicants should then register an interest to access the opportunity, download the Documents for completion and submit a response.

For details on how to register, access an opportunity and submit a response refer to Appendix A ProContract User Guide.

2 Procurement Information

2.1 Background Information

Torbay Authority no longer employs a specialist Governing Body Support Team, a specialist English (as an Additional Language) Teacher, or an advisor with responsibility for Standing Advisory Committee for Religious Education (SACRE). This has resulted in ad hoc arrangements for these services, during recent times.

The Authority is conducting this Tender process to formalise future arrangements by putting a Contract in place for these three support services.

The overall aim is to ensure Torbay schools have access to good quality help and support for Torbay Governing Body Support Services, for Ethnic Minority and Traveller Services and continuous support for Standing Advisory Committee for Religious Education (SACRE). The Authority needs to retain oversight of these services in order to ensure that its statutory duty is met and to ensure that the services meets its needs.

2.2 Minimum Requirements

Applicants must be able to demonstrate they will meet any Minimum Requirements set out in Part 3 Specification for the whole term of this Contract.

2.3 Contract Period

It is anticipated that the Contract will commence on 01 September 2017 or at a date to be agreed for a period of 2 years and may be extended for a period of up to 2 further year(s)

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or until the end of the allocated budget, subject to termination clauses within Terms and Conditions of Contract and as provided for in *72 Modification of contracts during their term* of the Public Contracts Regulations 2015.

2.4 Division of Contract into Lots

This Contract is being divided into Lots:

- Lot 1 - Support for Torbay school's Governing Body Support services;
- Lot 2 - Support for Torbay Ethnic Minority and Traveller Support;
- Lot 3 - Provision of an Adviser to Torbay Standing Advisory Committee for Religious Education (SACRE).

Please refer to Part 2 Specification for full details on the requirements for each of the three Lots.

Applicants may submit Tenders, for Lot 1, Lot 2 and Lot 3. Applicants are not limited to the number of Lots they apply for or the number of Lots they may be awarded. Each Lot will be evaluated separately.

A separate Contract will be awarded for each Lot. Should Lots 1, 2 or 3 be awarded to a single Applicant, the Authority reserves the right to issue a single Contract.

2.5 Contract Price

Torbay Council's expectation is that the price(s) offered by the successful Applicant for Lots 1, 2 and 3 are fixed at the Contract commencement date for the initial 2 year period of Contract and (if the Contract is extended) is then reviewed and mutually agreed upon, for a period of up to 2 further year(s), (the duration of the Contract), in line with RPI.

Any price variations will not take effect until they have been mutually agreed by both parties in accordance with the *Change Control Procedure* at Schedule 9 of the Contract.

2.6 Variant Bids

The Authority will consider variant bids.

Applicants are encouraged to be innovative in their thinking when preparing bids and to provide any suggestions and solutions that provide a more cost efficient and value for money solution.

The Authority may, at its sole discretion, consider variant bids where these are based on a demonstrable value for money rationale.

The Authority will only accept variant bids if they meet the Specific and Mandatory requirements within Part 3 Specification. Variant bids submitted which do not meet these requirements will be deemed to be non-compliant and not capable of acceptance by the Authority.

Variant bids may only be submitted where a compliant bid is also submitted.

The published evaluation criteria will be used to assess whether the variant bid represents the most economically advantageous tender or not, taking all factors into account.

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Variant bids must be set out in writing, as a separate document to the tender and accompanied by Part 4 Submission and Part 5 Pricing. Whilst Part 5 Pricing does not need to follow the structure set the information provided must be capable of being assessed against the stated criteria. The full scope of the proposal, including costings and implementation details must be submitted in accordance with the terms set out in these tender documents.

2.7 Procurement Timetable

The Authority proposes the following timetable for the award of the Contract(s):

Procurement Stage	Dates
Tender Documents Published	Thursday 13 July 2017
Clarification Question Submission Deadline	Thursday 03 August 2017
Clarification Responses Deadline	Within 3 working days
Tender Submission Date & Time	Thursday 10 August 2017 no later than 12:00 noon
Evaluation Period	Friday 11 to Friday 18 August 2017
Contract Award Notification	Monday 21 August 2017
Contract Start	Friday 01 September 2017

The Authority reserves the right to change the above timetable and Applicants will be notified accordingly if there is a change.

2.8 Authority Representatives

Applicants are advised that the Authority Representatives will only respond to queries or questions in relation to this Tender opportunity through ProContract and are unable to respond to any questions raised verbally or by email.

Authority Authorised Representative:

Debbie Horn, School Improvement Officer, School Governing Body Support

Procurement Representative:

Lawrence Brown, Category Procurement Lead

3 Procurement Process

3.1 Procurement Procedure

This Procurement is being undertaken in accordance with the Authority's Contract Procedures and in accordance with the Public Contracts Regulations 2015 (SI 2015/102).

3.2 Stage One Selection

The Authority will use a Qualitative Selection process to test the Applicant's previous experience, existing capacity, compliance with relevant legislation and their ability to demonstrate that there are no formal grounds for exclusion.

The Selection Questionnaire can be found in Part 3 Selection Questionnaire.

The Applicant's response will be evaluated in accordance with the scoring methodology set out in section 3.4 below.

Applicants will need to satisfy the requirements of Stage One in order for their Stage Two response to be evaluated.

Please Note: Applicants are required to submit responses to Part 3 Selection Questionnaire, Part 4 Award Questionnaire, Part 5 Pricing AND Part 6 Certificates and Declarations.

3.2.1 Online Questionnaire

Applicants should note they may be required to respond to some of the Selection Questions on-line, where this is required details can be found in Part 3 Selection Questionnaire.

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3.2.2 Selection Criteria

Applicants are advised to ensure they have read and fully understand the criteria below, which will be used in the evaluation process:

Stage One Selection	Evaluation Criteria	Main Criteria	Sub-Criteria	Threshold
Part 3 Selection Questionnaire		Pass		Pass
Part 1 Potential Supplier Information, comprising:	The Authority may exclude any Applicant who fails part or all of this section.			
Section 1 Potential Supplier Information	This will be assessed on the basis of pass or fail. In order for the response to be considered a pass it must be fully completed by the Applicant and the Applicant must demonstrate that they meet the requirements of this section.		Pass	Pass
Section 1 Bidding Model	This section will be assessed on the basis of pass or fail. The Applicant must demonstrate that the Bidding Model proposed meets the requirements of the tender to pass.		Pass	Pass
Section 1 Contact Details and Declaration	This section will be assessed on the basis of pass or fail. The Applicant must fully complete this section.		Pass	Pass
Part 2 Exclusion Grounds:	The Authority may exclude any Applicant who fails this section.			
Section 2 Grounds for Mandatory Exclusion	<p>This will be assessed on the basis of pass or fail. The Authority may exclude any Applicant who answers 'Yes' in any of the situations set out in this section.</p> <p>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.</p>		Pass	Pass

Stage One Selection	Evaluation Criteria	Main Criteria	Sub-Criteria	Threshold
Section 3 Grounds for Discretionary Exclusion	This will be assessed on the basis of pass or fail The Authority may exclude any Applicant who answers 'Yes' in any of the following situations set out in this section		Pass	Pass
Part 3 Selection Questions	The Authority may exclude any Applicant who fails part or all of this section.			
Section 4 Economic and Financial Standing	<p>This will be assessed on the basis of pass or fail. The Applicant must demonstrate that they meet the requirements of this section in order to pass it in its entirety.</p> <p>Assessment of Suitable Financial Standing</p> <p>In order to demonstrate they have suitable financial standing to meet the following minimum requirements:</p> <ul style="list-style-type: none"> The Applicant's annual turnover, for the previous 2 financial years, must be a minimum of twice the Annual Contract Value of: £4,500¹ for Lot 1 £4,500¹ for Lot 2 £6,000¹ for Lot 3; and The Applicant must yield a Failure Score of 50 or more on the financial check which the Authority will undertake through the credit management agency DNBi. The credit check relates to the D&B Failure Score which identifies the level of risk of a business failing. Please Note: Unless the Applicant states otherwise the credit check will be carried out using the company registration 		Pass	Pass

¹ The annual contract value is defined as the minimum anticipated spend over the life of the contract divided by the length of the contract, including any extensions.

Stage One Selection	Evaluation Criteria	Main Criteria	Sub-Criteria	Threshold
	<p>number given at 1.1(e) of Section 1 Potential Supplier Information.</p> <p>Please Note:</p> <ul style="list-style-type: none"> • In responding 'Yes' to question 4.2(a) the Applicant is making a self-declaration that they meet the Authority's annual turnover requirement*² and giving permission for the financial check to be undertaken. • Where the Applicant responds 'No' to question 4.2(a) they must provide details at 4.2(b) or they will be deemed to have failed this section in its entirety. <p>Submissions will be assessed as follows:</p> <ol style="list-style-type: none"> 1. Where the Applicant refuses permission for the credit check to be undertaken they will be deemed to have failed this section in its entirety, their submission will not be evaluated further and they will be notified accordingly. 2. Where the Applicant fails the turnover requirement and the credit check yields a Failure Score of below 30 they will be deemed to have failed this section in its entirety, their submission will not be evaluated further and they will be notified accordingly. 3. Where: <ol style="list-style-type: none"> a) the Applicant fails the turnover requirement and the credit check yields a Failure Score between 30 and 49; or 			

² The successful Applicant may be required to evidence that they meet the turnover requirement.

Stage One Selection	Evaluation Criteria	Main Criteria	Sub-Criteria	Threshold
	<p>b) the Applicant passes the turnover requirement and the credit check yields a Failure Score of below 50; or</p> <p>c) the credit check does not yield a Failure Score and the Applicant either passes or fails the turnover requirement;</p> <p>The financial information will be referred to the Authority's Finance Department for further investigation. The Finance Department will make a decision on whether the Applicant's financial standing is deemed suitable to meet the Authority's minimum requirements or not. Applicant's made be contacted to provide the additional financial information stated in question 4.1.</p> <p>Where the Finance Department considers the Applicant's financial standing to be suitable they will be deemed to have passed this section.</p> <p>Where the Finance Department considers the Applicant's financial standing is not suitable they will be deemed to have failed this section in its entirety their submission will not be evaluated further and they will be notified accordingly.</p> <p>Please Note: The Corporate Finance Department's decision is final.</p>			
Section 5 Further Details in Relation to Applicants who are Part of a Wider Group	This section is for information purposes and will not be assessed, other than for checking that it has been completed where applicable.		N/A	N/A

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Stage One Selection	Evaluation Criteria	Main Criteria	Sub-Criteria	Threshold
Section 6 Technical and Professional Ability – Relevant Experience and Contract Examples	This section will be assessed on the basis of pass or fail. The Applicant must demonstrate they have relevant experience in delivering similar requirements, or are able to explain why they are unable to provide a minimum of one example.		Pass	Fail
Section 7 Requirements under the Modern Slavery Act 2015	This section will be assessed on the basis of pass or fail. The Applicant must demonstrate they meet the requirements, if applicable.		Pass	Pass
Section 8 Insurance	This section will be assessed on the basis of pass or fail. The Applicant must demonstrate they meet all applicable requirements.		Pass	Pass

Please Note: The Applicant must submit a completed SQ Part 1 and 2 Declaration for each organisation that it relies on to meet the selection criteria (including parent companies, affiliates, associates, or essential subcontractors). SQ Part 1 and Part 2 Declarations will be assessed in accordance with the criteria above.

3.3 Stage Two Award

The Authority will only evaluate the Stage Two submissions of those Applicants who have satisfied the requirements of Stage One Selection and meet any mandatory requirements for Stage Two.

Applicants are required to complete and submit Part 3 Selection Questionnaire, Part 4 Award Questionnaire, Part 5 Pricing and Part 6 Certificates and Declarations.

The Applicant's response will be evaluated in accordance with the scoring methodology set out in section 3.4 below.

3.3.1 Award Evaluation

The Award criteria have been designed to assess the Most Economically Advantageous Tender (MEAT) and the top scoring Applicant will be considered to have been successful.

Applicants are advised to ensure they have read and fully understand the criteria below, which will be used in the evaluation process:

Stage Two Award	Evaluation Criteria	Main Criteria	Sub-Criteria	Threshold
Part 4 Award Questionnaire and Part 5 Pricing Submission		100%		
Mandatory Criteria: (applicable to both Lots 1 and 2)	The question within this section will be assessed on the basis of pass or fail. The Authority may exclude any Applicant who fails this section.		Pass	Pass]
<i>Lot 1 - Support for Torbay school's Governing Body Support services</i>				
Method Statement: Lot 1 - Support for Torbay school's Governing Body Support services	The question within this section will be assessed on a scoring basis.		35%	
Technical Questions: Lot 1 - Support for Torbay school's	The question within this section will be assessed on a scoring		35%	

Stage Two Award	Evaluation Criteria	Main Criteria	Sub-Criteria	Threshold
Governing Body Support services	basis.			
Pricing	<p>The Pricing evaluation will be based on the Price per delegate, per course x 30 delegates (the approximate number within the last 12 months), plus the price for Helpline facility (per academic year), to give a total price <u>for Evaluation purposes only</u>, within cell C9 of the Pricing Schedule.</p> <p>Applicants should note that cells C8 and C9 (used for evaluation purposes only) will automatically calculate as prices are inserted. The formula in cell C9 must not be amended.</p> <p>Applicants with the lowest Total price, will score maximum marks out of a possible 100 and Applicants submitting higher prices will be awarded marks proportionate to their distance from the lowest Total price.</p> <p>Applicants must not alter or amend the format of the spreadsheet in any way and must submit it as an Excel document.</p>		30%	
Lot 2 - Support for Torbay Ethnic Minority and Traveller Support				
Method Statement: Lot 2 - Support for Torbay Ethnic Minority and Traveller Support	The questions within this section will be assessed on a scoring basis.		40%	
Technical Questions: Lot 2 - Support for Torbay Ethnic Minority and Traveller Support	The questions within this section will be assessed on a scoring basis.		30%	

Stage Two Award	Evaluation Criteria	Main Criteria	Sub-Criteria	Threshold
Pricing	<p>The Pricing evaluation will be based on the Price per delegate, per course x 30 delegates (the approximate number within the last 12 months), plus the price for Helpline facility (per academic year), to give a total price <u>for Evaluation purposes only</u>, within cell C20 of the Pricing Schedule.</p> <p>Applicants should note that cells C19 and C20 (used for evaluation purposes only) will automatically calculate as prices are inserted. The formula in cell C20 must not be amended.</p> <p>Applicants with the lowest Total price, will score maximum marks out of a possible 100 and Applicants submitting higher prices will be awarded marks proportionate to their distance from the lowest Total price.</p> <p>Applicants must not alter or amend the format of the spreadsheet in any way and must submit it as an Excel document.</p>		30%	
Lot 3 - Provision of an Adviser to Torbay Standing Advisory Committee for Religious Education (SACRE)				
Method Statement: Lot 3 - Provision of an Adviser to Torbay (SACRE)	The question within this section will be assessed on a scoring basis.		45%	
Technical Questions: Lot 3 - Provision of an Adviser to Torbay (SACRE)	The question within this section will be assessed on a scoring basis.		25%	
Pricing	The Pricing evaluation will be based on the Price, per advisor, to attend 3 SACRE meetings per annum (to include actioning of		30%	

Stage Two Award	Evaluation Criteria	Main Criteria	Sub-Criteria	Threshold
	<p>any requests from each meeting) plus the price for provision of the annual report, to give a Total price, <u>for Evaluation purposes only</u>, within cell C31 of the Pricing Schedule.</p> <p>Applicants should note that cells C30 and C31 (used for evaluation purposes only) will automatically calculate as prices are inserted.</p> <p>Applicants with the lowest Total price, will score maximum marks out of a possible 100 and Applicants submitting higher prices will be awarded marks proportionate to their distance from the lowest Total price.</p> <p>Applicants must not alter or amend the format of the spreadsheet in any way and must submit it as an Excel document.</p>			

3.4 Scoring Methodology

Responses will be assessed on the following basis:

3.4.1 Pass/Fail

Where evaluation criteria are being assessed as either a pass/fail, the response will be assessed as either a pass or a fail. Guidance as to the Authority's minimum requirements in relation to what constitutes a pass or a fail can be found within each question.

Should an Applicant fail one or more questions, they will be considered to have failed the Tender process in its entirety and shall be deselected from participating further in this process and will be notified accordingly.

3.4.2 One to Ten Scoring

Where evaluation criteria are being assessed on a scoring basis, a one to ten scoring system will be used in accordance with the guidelines in the table below. The scoring system awards the highest marks to Applicants who show innovation, creativity, further relevant details and information that could potentially enhance the Applicant's proposal. It should be noted that to achieve the highest marks available for the questions you should not only meet but exceed the requirements of the specification.

0	No response	No response	
1	Extremely Weak	Very poor proposal/response; does not cover the associated requirements, major deficiencies in thinking or detail, significant detail missing, unrealistic or impossible to implement and manage	Weak
2	Very Weak	Poor proposal/response, only partially covers the requirements, deficiencies in thinking or detail apparent, difficult to implement and manage	
3	Weak	Mediocre proposal/response, moderate coverage of the requirements, minor deficiencies either in thinking or detail, problematic to implement and manage	
4	Fair - Below Average	Proposal/response partially satisfies the requirements, with small deficiencies apparent, needs some work to fully understand it	Fair - Good
5	Fair – Average	Satisfactory proposal/response, would work to deliver all of the Authority's requirements to the minimum level	
6	Fair - Above Average	Satisfactory proposal/response, would work to deliver the majority of the Authority's requirements to the minimum level with some evidence of where the Applicant could exceed the minimum requirements	
7	Good	Good proposal/response that convinces the Authority of its suitability, response slightly exceeds the minimum requirements with a reasonable level of detail	Strong - Excellent
8	Strong	Robust proposal/response, exceeds minimum requirements, including a level of detail or evidence of original thinking which adds value to the bid and provides a great deal of detail	
9	Very Strong	Proposal/response well in excess of expectations, with a comprehensive level of detail given including a full description of techniques and measurements employed	
10	Outstanding/Excellent	Fully thought through proposal/response, which is innovative and provides the reader with confidence of the suitability of the approach to be adopted due to the complete level of detail provided	

4 Tender Requirements

4.1 Communication

All communication between the Authority and Applicants will take place through ProContract, this includes but is not limited to:

- (a) clarification questions;
- (b) submission of Confidentiality Agreements and issue of confidential Documents;
- (c) requests to participate in site visits;
- (d) suggestions and queries in relation to the Terms and Conditions
- (e) post tender clarification questions;
- (f) invitations to demonstrations, interviews or presentations;
- (g) outcome notification letters.

Please Note: Applicants are responsible, at all times during the Tender process, for checking whether any messages or amendments have been issued and should not rely solely upon automatic notification from ProContract.

4.2 Tender Clarification

Please Note: The Authority will only accept clarification questions, including queries or suggestions on the Terms and Conditions, during the clarification period stated in the Procurement Timetable, unless the question is directly related to a response issued by the Authority on or after the deadline for submission of questions.

The Authority will not negotiate on or any of the substantive terms of the Documents.

Responses to clarification questions will be provided to all Applicants except where the question:

- (a) is innovation based, in which case the response will only be provided to Applicant who raised the question; or
- (b) relates to confidential Documents, in which case the response will only be provided to Applicants who have submitted a Confidentiality Agreement.

The Authority will endeavour to respond to clarification questions within 5 working days of the date the question is submitted, or the next working day if the question is submitted on a non-working day.

The identity of Applicants raising questions will remain confidential.

Applicants are responsible for ensuring they read and understand all of the responses to questions that have been raised.

Applicants will need to register an interest in the Tender in order to access responses to clarification questions and receive communications from the Authority regarding amendments to the Documents.

4.3 Amendment to Documents

Amended Documents will be made available in both the publicly accessible opportunities area of ProContract and within the tender opportunity itself, except where the amendment relates to a confidential Document. Where necessary the Tender Submission deadline will be extended to enable Applicants time to take these changes into account.

Where the amendment relates to a confidential Document the amended Document will only be shared with those Applicants who have submitted a Confidentiality Agreement.

Amended Documents will form part of the resultant Contract.

Please Note: Applicants are responsible for ensuring they have read all communications and the amended Documents and will be considered to have taken any amendments into account when preparing their submission.

4.4 Post Tender Clarification

Post tender clarification will be for the purposes of clarifying or supplementing the content of an Applicant's submission or the Authority's requirements where this would not be discriminatory to other Applicants. Questions may be issued to one, some or all Applicants as appropriate.

Where post tender clarification results in substantial modification to the Contract the Authority reserves the right to restart or abandon the Tender process.

Please Note: Failure to respond to post tender clarification questions in a timely manner may result in the Applicant's Tender being rejected.

4.5 The Tender Documents

The Documents are and shall remain the intellectual property of the Authority. Applicants may only copy or reproduce the Documents for the purposes of their response. If no response is submitted the Applicant shall delete any documents downloaded.

Where an Applicant identifies an error or omission within the Documents they should immediately notify the Authority through ProContract. The Authority will then rectify the error or omission and re-issue any amended Documents.

Any Documents considered by the Authority to be of a confidential nature will not be made publicly available. Applicant are responsible for ensuring that confidential Documents are treated as such, are used only for the purposes of this tender and are not disclosed in whole or part to any 3rd party without the Authority's prior written consent.

Applicants can access confidential Documents by completing and submitting the Confidentiality Agreement through the ProContract Messaging Facility.

The Authority may reproduce the whole or any portion of submitted Tenders for the purpose of tender evaluation.

4.6 Preparation and Completion of Tenders

Applicants are responsible for ensuring they fully understand the requirements and have all

the information they need to enable them to submit a response, within the time required. The Authority will not accept any claims related to an Applicant's failure to read and understand the Documents.

Applicants are responsible for meeting any costs, expenses or liabilities incurred in connection with this process, including if it is terminated or amended by the Authority. The Authority will not be responsible, nor will they pay for any expense or loss which may be incurred by Applicants in the preparation of their Tenders, or any other aspect of the Tender process.

Applicants are advised to note the following when completing their response:

- (a) all entries including responses to questions, rates, price totals or any other endorsements must be typewritten in English and in £ sterling. Handwritten responses will not be accepted;
- (b) responses must be submitted in the documents as provided or on-line where required;
- (c) the format and layout of the response documents must not be altered;
- (d) 6 Certificates and Declarations may be submitted in pdf format, but all other response documents must be submitted in the form issued;
- (e) responses should be made in full and should not refer to information provided elsewhere in the Submission;
- (f) where a word or page limit has been set any portion of the response which exceeds that limit will not be evaluated;
- (g) supporting documents / appendices will only be evaluated where these have been permitted within the response;
- (h) appendices, where permitted, must be clearly referenced within the response;
- (i) where a question does not apply to an Applicant they should clearly state N/A in the response section;
- (j) individual evaluators may not evaluate the entire response and the evaluation panel may include other stakeholders, such as partner organisations or people who use Council services;
- (k) do not make any assumptions about your past or current supplier relationship with the Authority or to assume that such prior relationships will be taken into account in the evaluation procedure;
- (l) all Documents must be completed in full and signed where required.

Please Note: Failure to complete or submit any of the Documents in accordance with the Authority's requirements may result in the Tender being rejected.

As arrangements relating to consortium bids or sub-contracting may change Applicants should respond on the basis of the arrangements envisaged at the time the Tender is submitted. The Authority must be notified immediately of any changes or proposed changes in relation to the bidding model, so that a further assessment against the selection criteria can be made. The Authority reserves the right to deselect the Applicant prior to any award of contract, based on an assessment of the updated information.

Where the Applicant is relying on the capacity of a consortium member or sub-contractor and that organisation does not meet any relevant selection criteria the Authority reserves the right to require the Applicant to replace the organisation with an alternative.

Before submitting any documentation, Applicants need to understand the nature of the transparency commitments for tenders and contracts and the scope of the Authority's ability to withhold material. What will be disclosed does not differ from that currently disclosable under Freedom of Information legislation, but Applicants must ensure they understand the limitations on Freedom of Information exemptions for confidentiality and commercially sensitive information. **Please Note:** Applicants are requested to clearly identify any documents they consider to be commercially sensitive either during the tender process or after conclusion of the Contract.

Please Note: Applicants are expected to read, understand and confirm their acceptance of the Terms and Conditions before submitting their Tender. Applicants cannot reserve the right to comment or negotiate on them at a later date.

4.7 Submission and Opening of Tenders

Applicants should submit all documentation electronically through ProContract (www.supplyingthesouthwest.org.uk) using the Response Wizard as directed in the 'Supplier Guide' located in the help section or in Appendix A ProContract User Guide.

Applicants are responsible for ensuring:

- (a) they have submitted all of the required documents in the correct format;
- (b) their response is submitted by the deadline. **Please Note:** any submissions classified by ProContract as late will be rejected.

In the event the Authority is made aware of any technical issues with ProContract, which may prevent Applicants from meeting the submission deadline, the deadline will be extended.

Where an Applicant decides not submit a Tender the Authority requests this is done by formally 'Opting Out' through ProContract, giving the reasons for non-submission. The Authority may contact Applicants who have expressed an interest but have not submitted a Tender, in order to understand their reasons for non-submission.

An Applicant's submitted Tender will constitute an irrevocable offer to provide the required goods, services or works.

Technical Support

Any Applicants who experience problems with ProContract should contact the support desk:

[**ProContractSuppliers@proactis.com**](mailto:ProContractSuppliers@proactis.com)

Or click on the Help link at the bottom of the web page.

Please Note: If your issue is time sensitive call:

0330 005 0352

This line is available 09:00 to 17:30 Monday to Friday (excluding English bank and public holidays).

All Tenders will remain electronically sealed until the Submission deadline, when they will

be unsealed, in the presence of an independent Verifier and a member of the Procurement Team.

4.8 Rejection of Tenders

The Authority will only reject Tenders where rejection is without prejudice to any other civil remedies available to the Authority or any criminal liability which the Applicant's conduct may attract.

The Authority will reject any Tender where:

- (a) submission was made after the date and time specified on the documents;
- (b) submission was not made through ProContract;
- (c) the Applicant's price exceeds the Authority's declared budget;
- (d) the Applicant has not accepted the Authority's Terms and Conditions. **Please Note:** the Authority will seek clarification from the Applicant prior to rejecting the Tender;
- (e) the Applicant acts in any way improperly, including but not limited to canvassing, price fixing or inducements (which relate to offences under the Bribery Act 2010, Section 117 of the Local Government Act 1972 or any future legislation); or
- (f) the Authority has become aware at any point that the Applicant has been afforded a competitive advantage or has a conflict of interest that cannot be rectified.

The Authority may at its absolute discretion reject any Tender where:

- (a) the price has been assessed as being abnormally low (see 4.9);
- (b) it is considered by the Authority to be incomplete (see 4.10) or vague;
- (c) it is not in accordance with the required format;
- (d) the Applicant alters the Documents in any way or misrepresents itself in terms of any previous information provided;
- (e) the Applicant does not respond to post tender clarification questions in a timely manner;
- (f) the tender has been qualified in any way; or
- (g) it is in breach of any condition contained within it.

4.9 Abnormally Low Tenders

Where an Applicant's price has been assessed as being abnormally low the Authority will require the Applicant to explain the price proposed and will assess the explanation in accordance with the guidance set out in the Public Contracts Regulations 2015. The Tender will only be rejected where the evidence provided does not satisfactorily account for the low price or where the Applicant has obtained State Aid that has resulted in a distortion in competition.

Advice in assessing the explanation may be sought from the Authority's Corporate Finance section.

4.10 Incomplete Tenders

Tenders will be considered incomplete where the Applicant has not:

- (a) submitted all of the required documents, including any supporting information requested;
- (b) fully completed all of the Documents required;
- (c) responded to all of the questions; or
- (d) submitted the Documents in the required format.

4.11 Evaluation and Award

All accepted Tenders will be evaluated in accordance with the evaluation criteria set out in the Documents.

The Authority will only complete a full evaluation of accepted Tenders which meet all of the mandatory requirements as set out within the Documents.

The evaluation will be carried out by an Evaluation Panel and will be moderated by a member of the Procurement Team.

Please Note: Not all Panel members may assess every question, but all Tenders will be evaluated in the same manner and by the same Panel. Evaluation Panels may not comprise solely of the Authority's Officers, but may also include other key stakeholders, such as partner organisations and people who use Council services.

On completion of the evaluation process approval to award the Tender will be sought in accordance with the Authority's approval procedure.

The Authority is not bound to make any award of Contract. If the Contract is awarded it will be on the basis of the most economically advantageous tender, which may not be the lowest price offered.

All Applicants will be notified of the Tender outcome at the same time, whether this is to award or not to award the Contract. Notification will be through ProContract.

Please Note: Applicants will be advised through ProContract of any changes to the decision date.

4.12 Legal and Contracting Arrangements

Information supplied by the Authority as part of the tender process is supplied in good faith and Applicants must satisfy themselves as to the accuracy of such information. The Authority accepts no responsibility for any loss or damage arising from the use by Applicants of such information. All information issued to Applicants must be treated as confidential.

Applicants must ensure that they are fully familiar with the nature and extent of the obligations that they will take on if their Tender is accepted.

This Tender will be run in accordance with the requirements of regulations *24 Conflicts of interest* and *41 Prior involvement of candidates or tenderers* of the Public Contracts Regulations 2015.

Where the successful Tender is on behalf of a consortium the Authority may require the consortium to assume a specific legal form or require joint liability for the execution of the Contract, where this is considered necessary for the satisfactory performance of the Contract.

The information provided by Applicants will be relied upon to be true and accurate and will form part of the Contract with the successful Applicant. **Please Note:** If any of the information provided by an Applicant is found to be inaccurate the Applicant may be excluded from further participation in this or any future Tender issued by the Authority and could lead to termination of any resultant Contract.

In submitting a response Applicants will be confirming to the Authority that:

- (a) they have satisfied themselves of the accuracy and viability of all prices or rates stated within their response;
- (b) all prices or rates quoted will (unless otherwise provided for in the Contract) cover all of the Applicant's obligations under the Contract;
- (c) they have obtained all of the necessary information in relation to risks, contingencies or any other circumstances which reasonably influence or affect its bid;
- (d) their Tender is accurate and sufficient.

The Authority may, at its absolute discretion, extend the closing dates and times by amending the Tender on ProContract. Prospective Applicants will receive notification of the change of submission date and time. Unless any such extension has been granted, Tenders submitted after the submission dates and times will not be considered.

The Authority may, at its sole discretion, terminate the tendering procedure at any time. If such action is taken, Applicants will be notified through ProContract.

The Authority reserves the right to restart or abandon the Tender process where the lowest price submitted exceeds its estimate or available budget.

The Applicant's offer shall remain open for acceptance for a period of 6 months from the closing date and may be extended by mutual agreement.

Please Note: if the successful Applicant does not accept the Terms and Conditions as drafted the Authority reserves the right to withdraw the Contract award and class the submission as non compliant.

Any acceptance of the Tender by the Authority will be communicated in writing to the Applicant and upon that acceptance the Contract shall become binding on all parties.

Prior to issuing the Contract the Authority will require the successful Applicant to provide evidence of compliance with any Contractual requirements, such as insurances, disclosure and barring service checks and policies and procedures. **Please Note:** If the successful Applicant is unable to provide this evidence the Authority reserves the right to withdraw the Contract award and class the submission as non compliant

The successful Applicant will not be allowed to commence performing the Contract prior to the formal Contract documents being signed by both parties, unless written agreement to do so has been given by the Authority's Legal Service.

5 Glossary

5.1 Tender Documents

The following documents, together with the Appendices and Links at 5.2 below, form the tender documents:

Document	Purpose	For Completion and Submission
Part 1 Information	Contains information on the procurement process and instructions on how it will be conducted.	No
Part 2 Specification	Contains Authority's requirements in relation to the goods, services or works being procured.	No
Part 3 Selection Questionnaire	Contains the Selection Questions and may include the requirement for Applicants to provide some on-line responses.	Yes
SQ Part 1 and 2 Declaration	Contains the Part 1 and Part 2 of the Selection Questionnaire, which must be completed by any organisations the Applicant relies on to meet the selection criteria. This document must be submitted by the Applicant on their behalf.	Yes, if applicable
Part 4 Award Questionnaire	Contains the Award Questions and may include mandatory requirements, method statements and/or technical questions.	Yes
Part 5 Pricing	Contains the Applicant's pricing proposals for this Tender.	Yes
Part 6 Certificates and Declarations	Contains the Certificates and Declarations which all Applicants must conform to.	Yes
Terms and Conditions of Contract	Contains the terms and conditions under which the resultant Contract will operated under	No Applicants are required to confirm

Document	Purpose	For Completion and Submission
		acceptance as part of their response

5.2 Appendices and Links

5.2.1 Appendix A - ProContract User Guide

5.2.2 Selection Questionnaire – List of Mandatory and Discretionary Exclusions:

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf

5.2.3 Selection Questionnaire – EU Definition of an SME:

<http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/sme-definition/>

5.2.4 Selection Questionnaire – PSC Guidance:

<https://www.gov.uk/government/publications/guidance-to-the-people-with-significant-control-requirements-for-companies-and-limited-liability-partnerships>

5.2.5

5.3 Definitions

You should include definitions for any terms you have used in the tender documents which require clarification.

Term	Definition
Applicant	An organisation that may respond to this Tender.
Authority	Torbay Council.
Authority Authorised Representative	The Officer leading the Tender process on behalf of the Authority who will be responsible for managing the resultant Contract.
Award	The process by which the Authority will determine the successful bidder in accordance with <i>Regulation 67 Contract award criteria</i> of the Public Contracts Regulations 2015.
Award Questions	The written response submitted by the Applicant to evidence their ability to meet the Authority's requirements, which will form part of the evaluation process upon which award of the Contract will be based.
Bidding Model	The Applicant's proposals relating to any consortia or sub-contracting arrangements that will be put in place in order to deliver the Contract.
Confidential Information	Any information or documents which the Authority considers is of a confidential nature and which will only be made available to Applicants who sign and submit a Confidentiality Agreement.
Consortia/Consortium	Two or more persons, at least one of whom is an economic operator, acting jointly for the purpose of being awarded a public contract in accordance with <i>Regulation 19 Economic operators</i> of the Public Contracts Regulations 2015.
Contract Term	The length of the Contract including extensions, if available.
Contracting Authority	Torbay Council and any other Authority on whose behalf Torbay Council may be working.

Term	Definition
Contractor	The Applicant awarded the Contract culminating from an offer to supply accepted by the Authority.
Messaging Facility	The area within ProContract where Applicants submit clarification questions and Confidentiality Agreements during the tender process and through which the Authority will post its replies.
Documents	All of the tender documents in relation to this Tender.
Eligible Users	Any organisation given access to the Contract resulting from this Tender.
Lead Applicant	The organisation leading the bidding process on behalf of its consortia or sub-contractor partners.
Lot	One of a number of categories of goods or services which a single procurement process has been divided into. The use of lots potentially allows for multiple providers to be appointed following One procurement process.
Official Purchase Order	The Authority's Official Purchase Order, to which these conditions apply.
ProContract	The e-tendering portal through which the Authority advertises opportunities and conducts Tenders.
Price Review Mechanism	The mechanism that will be used during the life of the Contract to review and vary the price.
Procurement Representative	The Procurement Officer who is leading the procurement process on behalf of the Authority
Public Contracts Regulations	The UK legislation concerning public procurement, which can be found at: www.legislation.gov.uk .
Relevant Tax Authority	The organisation responsible for administering tax policy in the country in which the Applicant's organisation is established.
Standstill	The period, as set out in Regulation 87 of the Public Contracts Regulations 2015, immediately following notification of the award decision to Applicants during which the Authority must not enter into the Contract.

Term	Definition
Supplying the South West	Means the same as ProContract.
Tender	The invitation to bid for this Contract; and / or The Applicant's response to this tender opportunity.
Torbay Governing Body Support services	Support for Torbay Council's School Governing Body Support service, that provides courses, offers advice and information to subscribing schools within Torbay.
Transfer of Undertaking (Protection of Employment) Regulations 2006 (TUPE)	The regulations which govern how employers must deal with transfer of staff when a service or business changes hands from one employer to another in order to ensure the principal terms of employees' rights are protected.