

**Partnership Opportunity: Provision of Financial Capability Support for Building Better Opportunities Projects in Lancashire.**

**Reference: DN349419**

**INVITATION TO TENDER**

**Tender Return Document**

**Tenderer to Complete**

**Company name:**

**Closing date for receipt of completed Tender Documents: 16th July 2018 at 5pm**

**1. STANDARD SELECTION QUESTIONNAIRE**

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

The standard Selection Questionnaire is a self-declaration, made by you (the potential supplier), that you do not meet any of the grounds for exclusion. If there are grounds for exclusion, there is an opportunity to explain the background and any measures you have taken to rectify the situation (we call this self-cleaning).

A completed declaration of Part 1 and Part 2 provides a formal statement that the organisation making the declaration has not breached any of the exclusions grounds.

**Supplier Selection Questions: Part 3**

The procurement document will provide instructions on the selection questions you need to respond to and how to submit those responses. The applicant must be a single organisation and not a group or consortium.

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

**Consequences of Misrepresentation**

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 If an agreement has been entered into, you may be sued for damages and the agreement may be rescinded.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

**Notes for completion**

1. The “authority” means the Lead Partner Selnet Ltd, or anyone acting on behalf of the authority, that is seeking to invite suitable candidates to participate in this procurement process.
2. “You”/ “Your” refers to the potential supplier completing this standard Selection Questionnaire i.e. the legal entity responsible for the information provided. The term “potential supplier” is intended to cover any economic operator and could be a registered company; charitable organisation; Voluntary Community and Social Enterprise (VCSE); Special Purpose Vehicle; or other form of entity.
3. Please ensure that all questions are completed in full, and in the format requested. If the question does not apply to you, please state ‘N/A’. Should you need to provide additional information in response to the questions, please submit a clearly identified annex.

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

**Important: Please note that you are required to complete a number of elements of the Selection Questionnaire directly on The Chest supplier portal. Questions included within this document must also be completed (in the spaces provided) and the document must be uploaded to the Chest as part of your response. Documents / correspondence will not be accepted any other way.**

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| **Selection Questionnaire**  **Information to complete** | **Where to find / complete the information** |
| **Part 1 – Potential Supplier information \***   * Supplier information * Bidding Model * Declaration | These questions can be found on The Chest and must be completed via the system response wizard function or within the ‘Evaluation criteria/question sets’ section.  \*Please note that your response to these questions will be saved on The Chest for you to then use/review for any future tender opportunities with the same Authority. |
| **Part 2 – Exclusion Grounds \***   * Grounds for Mandatory Exclusion * Grounds for Discretionary Exclusion |
| **Part 3 – Selection Questions**   * Economic & Financial Standings * Modern Slavery Act 2015 * Insurance * Health & Safety |
| **Part 3 – Project Specific Selection Questions**   * Technical & Professional Ability - Quality | These questions appear below and must be answered in the spaces provided. |

**Additional Questions:** 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 award stage. Please note however that the Authority reserves the right to ask potential suppliers to submit their evidence at any point in the process if it is necessary to ensure the proper conduct of the procurement.

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|  | **It is a mandatory requirement of this contract that the successful Tenderer is able to demonstrate the criteria below:** |  |
|  | Please select the area(s) you are able to deliver in. You must be able to offer support within the whole of at least one of the three areas listed below. Should you be unable to deliver support to the whole of at least one are your tender will be deemed non-compliant and will not be scored:  Area 1 (Pendle, Burnley, Rossendale, Blackburn with Darwen, Hyndburn, Ribble Valley)  Area 2 (Preston, Chorley, West Lancashire, South Ribble)  Area 3 (Blackpool, Fylde, Wyre, Lancaster and Morecambe) | Area 1 □  Area 2 □  Area 3 **□** |
|  | **Insurance Levels (required at the contract Commencement Date)**   * Employer’s (Compulsory) Liability Insurance = £10million * Public Liability Insurance = £5million * Professional Indemnity Insurance = £1million   \*It is a legal requirement that all companies hold Employer’s (Compulsory) Liability Insurance of £5 million as a minimum. Please note this requirement is not applicable to Sole Traders. | ▢   Yes  ▢   No |
|  | **Conflict of Interest**  Do you consider there to be a conflict of interest in which there is a professional or personal interest which may make it difficult to fulfil your duties on this contract impartially? (if answered yes please detail conflict of interest) | ▢   Yes  ▢   No |

**2. REFERENCES**

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| **PLEASE PROVIDE 2 REFERENCES BELOW.**  **(PLEASE REFER TO GENERAL INSTRUCTIONS TO TENDERER FOR MORE INFORMATION REGARDING REFERENCES)** | |
| **REFERENCE 1** | |
| **Name of organisation** |  |
| **Point of contact in the organisation** |  |
| **Position in the organisation** |  |
| **E-mail address** |  |
| **Contract Title and brief description of contract** |  |
| **Contract Start date** |  |
| **Contract completion date** |  |
| **Approximate contract value** |  |
| **REFERENCE 2** | |
| **Name of organisation** |  |
| **Point of contact in the organisation** |  |
| **Position in the organisation** |  |
| **E-mail address** |  |
| **Contract Title and brief description of contract** |  |
| **Contract Start date** |  |
| **Contract completion date** |  |
| **Approximate contract value** |  |

# Important Note: You must provide the information requested in a manner and form which complies with the instructions given below and in the accompanying instructions.

**3. METHOD STATEMENT RESPONSES – QUALITY (WORTH 90%)**

**Please note:**

* You are required to provide a response to each of the following Method Statements. Your statements should be set out in a clear and concise manner (within the response box provided), fully detailing how you will deliver the requirements in the Specification.
* You must respond in full and avoid making unsubstantiated reference to company policies, statements or other documents. Please do not refer the evaluation panel back to your Selection Questionnaire (SQ) response. Any question that is not answered will automatically be awarded a zero mark.
* Attachments (e.g. - policy documents, procedures etc.) should only be provided as evidence in support of your written response. If attachments are submitted as an answer with little or no narrative, you will be automatically awarded a zero score. Further, where attachments are not referenced within the narrative they will not be given taken into account.
* If a response exceeds the specified word allocation, your response will only be assessed up to the allocated words.  Diagrams, pictures and charts should only be used to clarify points made within your response and not used to exploit the word count allocation.  Any tables or other diagrams containing text will be included within the word count.

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| **About your organisation** | **Not scored** |
| The Building Better Opportunities Programme helps individuals to overcome multiple complex needs, build confidence and resilience, and become less isolated from their local communities. Please describe briefly the purpose and aims of your organisation, and how these align with the aims of Building Better Opportunities. | |
| **Please respond below in no more than 150 words** | |

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| **1. Current Delivery** | **Weighting 15%** |
| Please describe any relevant grant funded projects you are currently delivering or have delivered in the past two years to a similar beneficiary group. Your response should include detail on your role, the funder, a description of the project and the beneficiary groups as a minimum.  ***Assessment Areas:***   * Relevance of the examples to the beneficiaries of this project * Demonstrates an understanding of funded projects | |
| **Please respond below in no more than 300 words** | |

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| **2. Experience** | **Weighting 20%** |
| Please describe your organisation’s recent experience and track record of supporting those financially excluded due to low financial capabilities. Please include examples of where you have provided support to people who meet the profile of those which BBO aims to support (see <http://selnet-uk.com/bbo/> for more information on each project).  ***Assessment Areas:***   * Demonstrates an understanding of target beneficiaries * Outcomes achieved * Impact demonstrated | |
| **Please respond below in no more than 500 words** | |

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| **3. Partnerships** | **Weighting 15%** |
| Close working relationships with other delivery partners and external stakeholders are essential to the success of the BBO projects.  Please provide details of your organisation’s existing partnerships with key organisations such as local Citizens Advice Bureau, other financial support organisations, local authorities and Housing Associations, education and training providers, employers etc.  Please explain how you will work with these organisations to enable delivery of this particular project, whilst ensuring that you are not duplicating provision.  ***Assessment Areas:***   * Evidences existing partnerships and networks * Details varied range of networks and partners * Demonstrates engagement of these partnerships to support delivery of this project * Addresses how BBO Financial Capability support to participants will not duplicate existing provision | |
| **Please respond below in no more than 300 words** | |

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| **4. Your Delivery Offer** | **Weighting 20%** |
| Please describe your proposed delivery offer, including:   * The structure and content of your delivery * How and where you will deliver your offer * How your offer will meet the needs of BBO participants – responsive service which recognises different support styles required * The envisaged outcomes for participants * Estimated timeline for mobilisation (recruitment, induction, delivery start)   ***Assessment Areas:***   * Responses provided for all elements of the question * Demonstrates a clear and concise delivery offer * Responds to requirements detailed in project brief | |
| **Please respond below in no more than 1000 words** | |

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| **5. Staffing** | **Weighting 15%** |
| Please use the table below to provide an outline of how you will staff your delivery offer. | |
| |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | **Job Title** | **No. of posts** | **Full/Part time** | **Hours per week** | **Directly employed or agency** | **Existing or new staff** | **Brief role description** | |  |  |  |  |  |  |  | |  |  |  |  |  |  |  | |  |  |  |  |  |  |  | |  |  |  |  |  |  |  | |  |  |  |  |  |  |  | | |
| **Please respond to question below in no more than 300 words**  Please add any further comments to support the above table. How do you know that the above staff structure is suitable for this project? Are/will the proposed staff members be trained/qualified to provide the level of support needed for this project? Will you need to recruit new staff?  ***Assessment Areas:***   * Provides confidence that the project will be sufficiently resourced * Provides confidence that proposed staff have/will have relevant level of training and/or qualification | |

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| **6. Delivery capacity** | **Weighting 15%** |
| Please provide the maximum number of participants you would be able to support in each area that you are proposing to offer support within. This cannot be lower than the minimum number of participants for each area stated within the brief. Costings to help inform your proposal can be found in the brief within the tender specification. Your response should offer reassurance that the level of quality will not be affected should you be proposing to deliver support to more than the minimum number of participants stated in the brief.  Number ………… Area 1 (Pendle, Burnley, Rossendale, Blackburn with Darwen, Hyndburn, Ribble Valley)  Number ………….. Area 2 (Preston, Chorley, West Lancashire, South Ribble)  Number …………. Area 3 (Blackpool, Fylde, Wyre, Lancaster and Morecambe) | |
| **Please respond below in no more than 300 words**  ***Assessment areas:***   * Meets the minimum number of participants stated in the brief * Demonstrates a rationale for retaining quality of provision where the organisation has proposed to deliver support to more participants than stated as a minimum in the brief | |

**4. PRICING INFORMATION (WORTH 10%)**

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| Please complete the required fields. If a field is not applicable, enter 0 or NA.  Please note:   * The maximum available budget for this project is £156,000. Any tenders received which are in excess of the specified budget will be considered to be a failed tender and will not be evaluated. * The rates and prices inserted in the Pricing Schedules will be inclusive of ALL disbursements. * If all information is not submitted, your submission may be classed as a fail. * All expenditure must fit into the headings provided in the table. * Selnet will not be liable for any costs / prices not identified in your submission. * All costs are to be in pounds sterling, to two decimal places. |
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| **Delivery Costings** | **Weighting 10%** |
| Please give a breakdown of costs using **only** the headings given in the table below.  **Please note overheads must be calculated at a flat rate of 15% of direct staffing costs only.** We recommend you carefully consider the allocation you include for administration costs due to the high level of compliance related activities which come as part of an ESF funded project. | |
| |  |  | | --- | --- | | **Cost Type** | **Cost (£)** | | Staff costs – directly employed |  | | Overheads (15% of directly employed staff line above) |  | | Staff costs – self employed |  | | Consumables (e.g. stationary) |  | | Equipment (e.g. IT) |  | | Participant allowances and expenses |  | | Staff expenses (e.g. mileage/transport) |  | | Venue hire |  | | Volunteer expenses |  | |  | **Total Cost (£)** | | |

**5. SIGNED DECLARATION / FORM OF TENDER**

Submitted by: (Organisation name) ………………………………………………………………………………….

Name & Address: ………………………………………………………………………………………………………

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Tel No: ………………………………………E-Mail:………………………………………………………………..

* I/We the undersigned, hereby guarantee that all services will comply with the requirements contained in the Authority’s Tender Document and undertake to provide to the satisfaction of Selnet Ltd the Services described herein.
* I/We confirm that the contents of this Tender will remain valid for 90 days from the date of this Form of Tender.
* I/We further undertaken and agree to execute if required to do so, after the acceptance of this tender, a formal collaboration and adherence agreement in accordance therewith to be prepared by Selnet Ltd.
* I/we hereby declare that neither I/we nor my/our employees, servants or agents have followed nor will follow in relation to the tender or any contract made pursuant there to the following practices:-

(a) The communication to a person other than the Authority of the amount of any proposed tender in accordance with any agreement and arrangement to so communicate:

* 1. The adjustment of the amount of proposed tender in accordance with any agreement or arrangement between me/ourselves and any person other than the Authority.
* I / We have not corrupted/amended any text whatsoever in this electronically transmitted tender document.

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| Name |  |
| Signed |  |
| Position Held |  |
| Date |  |
| Witnessed by |  |
| Address |  |

**6. CERTIFICATE OF NON-COLLUSION AND NON-CANVASSING**

*Note to Organisation*: It is important that Selnet Ltd receives genuine competitive offers from Tenderers, and that all Tenderers act in a manner that is honest and reflects best practices. Tenderers are therefore required to sign this document to certify that they have not and will not undertake any acts of canvassing or collusion.

Statement of Non-canvassing:

I/we hereby certify that I/we have not canvassed any member, director, employee or adviser of Selnet Ltd in connection with this Tender and the proposed award of the Contract by Selnet Ltd and that no person employed by me/us or acting on my/our behalf, or advising me/us, has done any such act.

I/we further hereby undertake that I/we will not canvass any member, director, employee or adviser of Selnet Ltd in connection with this Tender and the proposed award of the Contract and that no person employed by me/us or acting on my behalf, or advising me/us, will do any such act. I/we agree that Selnet Ltd may, in consideration of this tender, and in any subsequent actions, rely upon the statements made in this Certificate.

**Statement of Non-collusion:**

The essence of the public procurement process for selective tendering for the Contract is that Selnet Ltd shall receive bona fide competitive Tenders from all Tenderers.

In recognition of this principle, I/we hereby certify that this is a bona fide offer, intended to be competitive, and that I/we have not fixed or adjusted the amount of the offer or the price in accordance with any agreement or arrangement with any person.

I/we also certify that I/we have not done, and undertake that I/we will not do, at any time during the tender process or in the event of my/our tender being successful while the resulting Contract is in force, any of the following acts:

1. enter into any agreement or agreements with any other person that they shall refrain from tendering to Selnet Ltd or as to the amount of any offer submitted by them; or
2. inform any person, other than Selnet Ltd of the details of the Tender or the amount or the approximate amount of my/our offer except where the disclosure was in confidence and was essential to obtain insurance premium quotations required for the preparation of the Tender; or
3. cause or induce any person to enter into such an agreement as is mentioned in paragraph 1 and 2 above or to inform us of the amount or the approximate amount of any rival Tender for the Contract; or
4. commit any offence under the Public Bodies Corrupt Practices Act 1889, the Prevention of Corruption Acts 1889 to 1916 nor under Section 117 of the Local Government Act 1972; or
5. offer or agree to pay or give or actually pay or give any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other Tender or proposed Tender for the performance of the Project covered by the Tender any act or omission.

In this Certificate, the word ’person’ includes any person, body or association, corporate or incorporate and ‘agreement’ includes any arrangement whether formal or informal and whether legally binding or not.

I/we agree that Selnet Ltd may, in its consideration of the offer, and in any subsequent actions, rely upon the statements made in this certificate.

Signed

Name

Position

Date

For and on behalf of [please insert company name]

**7. INFORMATION PROVIDED IN CONFIDENCE & COMMERCIAL INTERESTS**

**The following forms should be submitted with all quotations and tenders to indicate areas of your submission that you consider to be either *INFORMATION PROVIDED IN CONFIDENCE OR OF COMMERCIAL INTEREST*.**

**It is important these sections are given consideration prior to submission of your bid. You must not simply indicate ‘tender response’ but must identify specific areas of your tender submission with the reason why you consider it to be provided in confidence or of commercial interest.**

**Confidential material** is as defined in Section 41 of the Freedom of Information Act, 2000 (FoI) where the disclosure of the information would constitute an actionable breach of confidence.

**Information deemed to be of commercial interest** is as defined in Section 43 of the FoI and relates to *‘information, the disclosure of which would be likely to prejudice the commercial interests of any person’*.

**Tenderers should make themselves aware of the definition of each term as well as the circumstances in which FoI & Environmental Information Regulations 2004 (EIR) exemptions apply.**

**Confidential material checklist**

**Confidential documents not for disclosure to third parties under the FoI & EIR**

**The authority may be obliged to disclose information in or relating to this quotation / tender exercise following a request for information under FoI or EIR therefore please outline in the table below all items which you consider are genuinely confidential and which are not for disclosure in respect of your application.**

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| **Information / Document** | **Reference / Page No.** | **Reasons for non-disclosure** |
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The applicant acknowledges that the confidential information listed in this schedule is of indicative value only and the authority may be obliged to disclose it pursuant to a request under the FOI or EIR.

The authority shall act reasonably and use its discretion when making a decision to release or withhold information pertaining to the above if it is requested. By indicating what information you believe to be confidential Selnet Ltd will consider your views however the authority will make the final decision to disclose information or not.

Note: To be kept with the correspondence for consideration should a request for information under the Freedom of Information Act 2000 or Environmental Information Regulations 2004 be received. This document can be destroyed in line with the retention and destruction schedule.

**Commercial Interests**

**Information deemed to be of commercial interest and not for disclosure to third parties under FoI or EIR.**

**The authority may be obliged to disclose information in or relating to this quotation / tender exercise following a request for information under the FoI or EIR therefore please outline in the table below items which you consider are genuinely commercially sensitive and which are not for disclosure in respect of your application.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Information / Document** | **Reference / Page No.** | **Reasons for non-disclosure (cite exemption(s) to be considered)** | **Duration of confidentiality** |
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The applicant acknowledges that the commercially sensitive information listed in this schedule is of indicative value only and the authority may be obliged to disclose it pursuant to a request under the FOI or EIR.

The authority shall act reasonably and use its discretion when making a decision to release or withhold information pertaining to the above if it is requested. By indicating what information you believe to be commercially sensitive Selnet Ltd will consider your views however the authority will make the final decision to disclose information or not.

Note: To be kept with the correspondence for consideration should a request for information under the Freedom of Information Act 2000 or Environmental Information Regulations 2004 be received. This document can be destroyed in line with the retention and destruction schedule.