



European Union
European Regional
Development Fund



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Low Carbon Lake District

Invitation to Tender for

The **Summative Assessment** of the ERDF funded Low Carbon Lake District programme:

1. Project name – ~~Low~~ **Low Carbon Lake District Grant Scheme**
2. Project name – **Electric Vehicles and Charging Infrastructure (National Trust & Lake District National Park Authority)**
3. Project name – **Southern Windermere Trail**
4. Project name - **Low Carbon Energy and Energy Efficiency (Lake Source Heat Pump – Ferry Nab, South Lakeland District Council and National Trust Solar PV – Sizergh, Hilltop, Bowe Barn and Campsites)**

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1. Introduction

Lake District National Park

The Lake District National Park Authority the public body responsible for statutory and strategic aspects of the Lake District National Park. Statutory responsibilities include planning, the Partnership Plan (Management Plan) and Rights of way, access and bylaws. The Authority's Strategic priorities are: Covid-19 recovery, Net Zero Carbon, Nature Recovery, The Future of Farming, Landscape Culture and Beauty, Smarter Travel, Affordable Housing and Lake District for Everyone.

The **Net Zero Carbon** priority is outlined as follows:

We will have largely implemented the necessary offsetting measures through externally funded projects on land under our control to achieve net zero carbon for our organisation in 2025. We will be leading net zero carbon in the National Park by 2037 through the Lake District National Park Partnership to resource the measurement, monitoring and communication of progress.

Low Carbon Lake District

The Lake District National Park Authority has secured £2.7M funding from the UK European Structural and Investment Fund to deliver a £4.9M programme of projects called Low Carbon Lake District (LCLD). LCLD consists of four projects:

1. Project name ~~Low~~ Low Carbon Lake District Grant Scheme
2. Project name – Electric Vehicles and Charging Infrastructure (National Trust & Lake District National Park Authority)

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3. Project name – **Southern Windermere Trail**

4. Project name - **Low Carbon Energy and Energy Efficiency (Lake Source Heat Pump – Ferry Nab, South Lakeland District Council and National Trust – Sizergh, Hilltop, Bowe Barn and Campsites)**

Low Carbon Lake District is funded under Priority Axis 4: Supporting the shift towards a Low Carbon Economy in all Sectors. It focuses on reducing business CO₂e emissions, whilst also aiming to stimulate market growth of the local environmental technology sector and showcasing low carbon opportunities.

Delivery of a Low Carbon Lake District programme by the Lake District National Park Authority has been underway for several years now, commencing in July 2019.

Between July 2019 and June 2021 the three projects have been in delivery, with some aspects of works delayed due to Covid-19 limitations in 2020.

The key output of the programme was to deliver annual CO₂ savings of 261 tonnes.

2. Programme Aims and Funding

The ERDF required outputs make up the aims of the LCW programme, these are:

- o C34 261- Tonnes of CO₂e saved.

The targets affixed to these aims vary within each LEP area, as in the table below:

Project	LEP Area	C34 (tonnes CO ₂ e)
Low Carbon Lake District Grant Scheme	Cumbria	122
Electric Vehicles and Charging Infrastructure (National Trust & Lake District National Park Authority)	Cumbria	45
Southern Windermere	Cumbria	22
Low Carbon Energy and Energy Efficiency (Lake Source Heat Pump – Ferry Nab, South Lakeland District Council and National Trust – Sizergh, Hilltop, Bowe Barn and Campsites)	Cumbria	72

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To achieve these aims the European Regional Development Fund has committed funds in the following way:

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Contract	LEP Area	Total Budget (£)	Total ERDF Funding (£)*
	Cumbria	4.9M	2.7M

*Potential to change subject to PCR, intervention rates were applied evenly

3. Delivery

The programme involves four main elements:

Low Carbon Lake District Grant Scheme

A new grant scheme focussed on supporting SME Businesses and community organisations with their low carbon investments. Subject to compliance with the de minimis rule, projects were funded at 60% with the remaining 40% match funded by the participating SME Businesses / community organisations. The grant scheme is managed by the Lake District Foundation.

The grant scheme built upon a similar scheme successfully delivered by the East Lancashire Chamber of Commerce. The scheme targets projects that deliver the largest carbon saving per £ invested and aims to support at least 25 businesses, achieve £1,000,000 of investment (approx. £600,000 from ERDF and £400,000 from participating businesses and groups) and 86 tonnes of carbon savings per year. The Authority undertook some 'soft market testing' with

potential applicants early in 2020 to understand what kind of financial support is required and further focus the grant scheme to ensure it is fit for purpose and able to achieve the highest carbon savings for the Lake District. The scheme first opened for registrations in April 2021 and to date has received 173 registrations, 68 full applications and has made 49 offers of grants worth £551,101. Projects supported so far include insulation, LED lighting, Biomass boilers, Solar PV and battery storage, air source heat pumps and energy efficient appliances.

Electric Vehicles and Charging Infrastructure (National Trust & Lake District National Park Authority)

This project will pilot the use of electric vehicles within the fleet operations of the National Trust and Lake District National Park Authority. Each partner will lease 5 vehicles and install new electric vehicle charge stations at key office locations and within public locations and car parks. The pilot will test operational issues of range and suitability with loads and off-road surfaces and test the ability of the currently available vehicles to deliver carbon savings from transport across the Lake District.

The provision of 5 leased electric vehicles from January 2020 to March 2023 and the installation of 24 charging points will be the visible and high profile to visitor, communities and businesses across the park. *A quote for the EVs is attached as Appendix 6. More information, for background, on the One Lakes EV Strategy is attached in Appendix 7.*

In addition to the electric vehicles, the project includes a budget of £100,000 to implement an electric bus pilot scheme which will be trialled between key high traffic areas, both as a demonstration of technology but also trialling new ways of delivering such services with flexible timetables, call-on services etc. A feasibility study to develop the concept was undertaken in January 2015 *(see Appendix 8)* which outlined the key benefits and of a service in the Grasmere Area as:

- *It would help tie together the geographically rather dispersed tourist attractions in-and-around Grasmere.*
- *In particular, it would link Dove Cottage on the eastern outskirts and Allan Bank, which does not permit access for visitors in private vehicles, on the western fringes. Visitors who spend less time walking between these two key attractions will have more time to enjoy the other delights of the village.*
- *A good proportion of visitors to Grasmere do have mobility issues, linked to age, disability or the fact they have small children or bulky luggage with them.*
- *It would help in promoting Grasmere as more of a day out destination, which is one of the 'quick win' recommendations in the Area Visitor Travel Plan. The aim would be to encourage visitors to leave their motor vehicles for extended periods to explore the range of attractions Grasmere has to offer, linked to history, literature, culture, landscape, art and access to spectacular countryside.*
- *It should help reduce short local car trips.*

- *It would improve access and orientation around Grasmere for those who do not arrive in their own vehicle, particularly those dropped off by bus or coach on the A591.*
- *It should provide an initiative around which local tourism service providers can coalesce, deriving mutual benefit and strengthening unifying ties.*

The National Trust provides car parking at a number of strategic locations around the Lake District. These are extensively used by visitors, with an estimated average of 2.5 million visitors using in them each year.

This project will install new charging points at: Wray Castle,Sizergh Castle, Low Wray Campsite, Sea Toller Car Park, Great Langdale Campsite and Sticklebarn Car Park. Indicative quotes for the installation of charging points across these locations is included in Appendix 9 and have informed the project budget. Match funding for the charging points is time limited, so this aspect of the project will be commissioned immediately upon approval, delivering impact and benefits early in the programme. Note outputs across the programme are reported to be recorded together at the end of the programme, but some, including those from this project will be captured and reported from year

The Authority has replaced existing petrol- and diesel-powered cars with modern, efficient and fully electric vehicles. This would see the Authority take a significant step towards its aspiration of running an all-electric vehicle fleet (with the exception of 4x4 vehicles - where suitable options are not yet available on the market).

The investment also supports the provision of charging points and infrastructure upgrades to sustain an all-electric fleet – with a range of fast / rapid charging points installed at all key LDNPA operational sites.

The replacement programme would lead to substantial direct carbon reduction on the LDNPAs operations, it would enact an effectively irreversible ‘modal shift’ in the composition of the LDNPA’s operational fleet away from petrol and diesel – and do so in a manner which would be sustainable within the LDNPA’s existing budgets beyond the ESIF Low Carbon Lake District II programme. It would also see the LDNPA take the lead and act as a key leader in respect of low-carbon operational transport at the sub-regional level. This will enable us to share experience with other public sector and private sector fleet operators and give confidence that electric vehicles can meet operational needs in a rural geography. The electric vehicles will be branded to show key messages and support of the EU England ESIF Programme.

The Lake District National Park Authority will be the key beneficiary with the programme making a significant contribution to the Authority’s own targets for carbon reduction. Lower costs on fuel consumption will also support further investment in park priorities benefiting the local community and all park users.

When not being utilised for operational purposes the charging points will also be made available for public use, greatly increasing the availability of EV charging infrastructure in Cumbria – benefiting local residents and visitors. The availability for public use will have a significant impact on the benefits delivered such that these will be closely tracked and reported.

Under this project, National Trust will invest in the following:

- 11 electric charging points at key car parks and campsites around the Lakes. There will be no charge for connecting to these points to encourage use of electric vehicles;
- 5 electric vehicles leased from April 2020 – March 2023; and
- 4 electric charging points at our property bases where these vehicles are based. Note, these chargers will be powered partly by solar power as part of a separate project.

Item	Timescale -EVs	Timescale - EVCPs
Design and Procurement	October 2019	October 2019
Appointment (Award of Contract)	January 2020	January 2020
Project Start Date	January 2020	January 2020
Project Completion (required before the end of the financial year by match funders)	March 2020	March 2020
Design and Procurement (Fleet)	September – January 2020	
Appointment (Award of Contract – Lease Contract for Vehicles)	January 2020	
Delivery of Vehicles	30 th March 2020	
Lease Contract Period (Vehicles)	1 st April 2020 – 30 th March 2023	
Evaluation	April 2023	

Under this project, the Authority will invest in the following:

- 5 electric vehicles leased from July 2020 – March 2023(subject to lead in times)

- 5 rapid chargers (with supporting infrastructure) at Lake District Head Office, Murley Moss, Kendal LA9 7RL
- 2 rapid chargers (with supporting infrastructure) at LD Northern Office, Threlkeld, Keswick CA12 4TT
- 2 standard chargers at LD Southern Office, Haverthwaite LA12 8AB

Item	Timescale
Design and Procurement (Charging Points)	July – January 2020
Appointment (Award of Contract – Charging Point Provision)	January 2020
Construction Start Date (Charging Point Provision)	March 2020
Construction Completion (Charging Point Provision)	June 2020
Design and Procurement (Fleet)	September – December 2019
Appointment (Award of Contract – Lease Contract for Vehicles)	January 2020
Delivery of Vehicles	1 st July 2020
Lease Contract Period (Vehicles)	1 st July 2020 – 30 th March 2023 (3 year term)
Evaluation	April 2023

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Southern Windermere Trail

This project will provide new and integrated low-carbon travel options around Lake Windermere.

~~A Project Prospectus containing up to date project information including drawings, programme and costs is included in Appendix 41.~~

This project will create an off-road cycleway ~~from Newby Bridge to the Windermere Ferry~~ along the south western shore of Windermere. Subject to all necessary permissions, currently being negotiated, this will link to the existing Windermere West Shore Way and

create a cycle route along the entire western shore of England's largest lake, with a further link along the south eastern shore as far as the National Trust owned Fell Foot site.

It links together a number of interventions in the Low Carbon Lakes 1 programme (specifically, the investments at Brockhole) and for the Low Carbon Lakes II (this proposal) it links with the project on the Fell Foot Jetty, development of low carbon visitor itineraries and e-bike network. The 6 main attractions in the Southern Basin (Fellfoot Park, Lakeside Aquarium, Lakeside and Haverthwaite Railway, Windermere Lake Cruises, The Swan Hotel and Spa and Lakeside Hotel have an estimated 1.8m visitors per year (2016 estimate) in a relatively small area. Often people seek to drive in this area, between attractions, creating a significant number of journeys and carbon emissions.

These interventions will enable residents and visitors to reduce the need for car by either parking all day in one location and use this new infrastructure to walk, cycle or use the boat services on the lake (connecting with the other jetty).

The project divides into six sections:

Section 1. Fell Foot to Swan Hotel; (Not in scope)

Section 2. Swan Hotel to Lakeside;

Section 3. Lakeside (west of village);

Section 4. Lakeside to Finsthwaite / Bobbin Mill

Section 5. High Dam (Finsthwaite) to Black Hole Wood

Section 6. Black Hole Wood to YMCA

A more detailed summary of these sections and their costs and specifications is provided in the Granular Budget. ~~Further description and background to the project is contained within the attached Project Initiation Document prepared by the Authority in Appendix 13 and a detailed benefit register for the project in Appendix 14.~~

The total length of the new sections of lake-shore tracks would be approximately ~~58,630~~ 58,600 m, with linkages. Legal work will be undertaken to establish the route as a public bridleway on all sections, with a crushed stone surface 2.5 m wide (average) with 0.25 m verge to each side, paralleling the lakeshore for the most part with occasional local deviations. Surface finish will be to the standard required as a 'Route for all' as defined in the National Park Authorities 'Miles without Stiles' publicised and promoted programme catering for those with specific mobility needs.

Fell Foot is a popular country park on the shores of Windermere, England's largest lake, offering the only easy public access to Windermere Lake south of Bowness. It attracts an estimated 170,000 visitors/year from a wide range of audiences, from summer visitors to the Lakes to regular locals.

Access is almost exclusively by car. There is a limited bus service that passes the park and a small jetty that allows small ferries to visit from Lakeside on the opposite shore of the Lake. However, the jetty is too small to cope with the larger ferries which run the length of Windermere and this considerably constrains the opportunities to encourage more people to adopt non-car use and limits opportunities/capacity to store their bike on the boat.

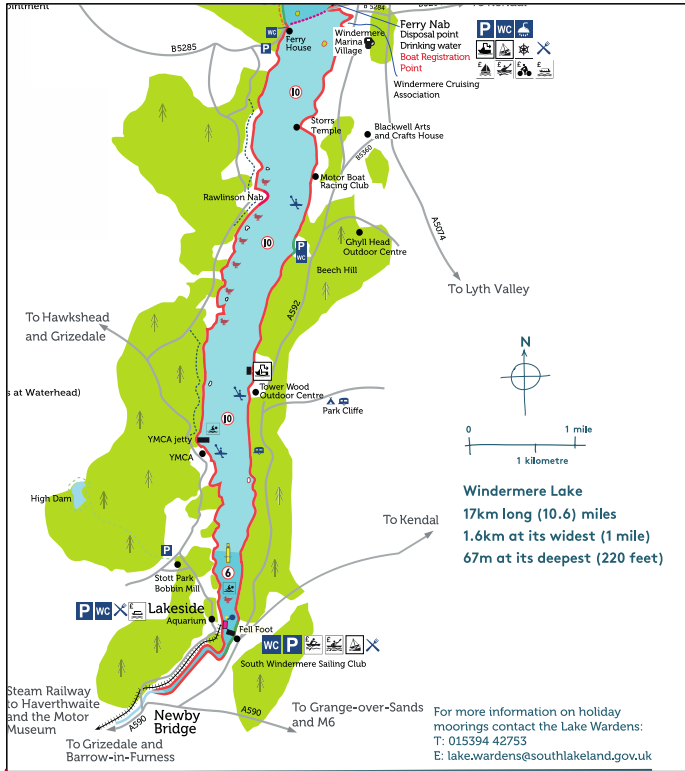
~~As part of the wider Southern Basin proposals put forward by the Authority, we will construct a new jetty and reception point at Fell Foot that will enable the larger ferries to dock and thus connect Fell Foot into the wider full-lake ferry network and also enable greater storage of bikes on board.~~

~~The project will enable National Trust to deliver:~~

- ~~• a new jetty capable of hosting the larger ferries (see plan drawings in Appendix 31); and~~
- ~~• adaption work to the listed boathouse to act as a reception point for passengers.~~

~~Planning consent for Fell Foot is understood to be in place. The Design and Access Statement is included as Appendix 20 along with a Marine Impact Report (Appendix 21) and Bat Survey (Appendix 22). Some cost work has already been carried out, a quote for the decking work is included in Appendix 23. Examples of the interpretative banners intended for the project site are included in Appendix 24 along with a quote for this work (note, banners and signs for this project will include EU logo and messaging).~~

~~**Illustration of Windermere Southern Basin – note connections to Jetties and Ferry Nab**—a more detailed plan illustrating the key sections is provided in Appendix 10 and 41~~



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Item – Southern Windermere – see detailed programme	Timescale
Commissioning of design and consenting works	December 2019
Consultation with stakeholders	October 2019 - December 2019
Submission of Planning applications	April 2021
Procurement of contractors	April 2020
Construction	May 2022
Completion	March 2023
Evaluation	March 2024

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A more detailed project programme is provided in Appendix 11.

Low Carbon Energy and Energy Efficiency

This programme of projects includes energy efficiency investments at Sizergh Castle and a network of solar PV projects delivered by National Trust and South Lakeland District Council.

The National Trust want to test out advanced environment control at Sizergh Castle, where they currently have a Trend BMS which controls conservation heating to the main visitor areas and the south wing. This is not up to the best modern standards and needs to be upgraded and heating areas improved. Experience gained here will help us develop plans for any future upgrades at our other heritage properties such as Hill Top. ~~See attached client brief in Appendix for more background on the project.~~

2018 Energy usage:

Item	Total	% used for heating
Electricity	149,604kw	40%
Gas	109,831	90%

We estimate a new system and controls could save 5-10% of the amounts used for heating, depending on conservation use and set up.

ESIF Funding will be spent on:

- Specification development;
- Procurement; and
- installation and commissioning of a new environmental control system

Item	Timescale
Design and Procurement	June – December 2021
Appointment (Award of Contract)	April 2022
Construction Start Date	June 2022
End of Construction Period	August 2022
Commission	September 2022
Evaluation	November 2022

Lake Source Heat Pump – Ferry Nab (South Lakeland District Council)

The project will install a Lake Source Heat Pump system on jetty adjacent to the Ferry Nab building and is expected to save 12 tonnes of CO₂ and generate 80% of the electricity required for the site. The heat pump utilises solar energy stored in the ground and in lakes. The energy utilised is free and eco-friendly, and contributes to a reduction of CO₂ emissions.

To reach this energy resource, a liquid-filled collector hose measuring 200-500 metres is laid in the ground or in a lake. The circulating liquid in the hose is heated by the stored solar energy. The liquid passes through the heat pump where a compressor raises the temperature by means of a refrigerant and a heat exchanger in a closed system, after which the heat is distributed to the building's heating system. This project was featured in a wider feasibility and options study ~~(see Appendix 21). Note the financials outlined (FITs etc.) would not be relevant if the project were to receive ERDF support.~~



National Trust – Sizergh, Hilltop, Bowe Barn and Campsites

The National Trust has a strategic commitment to reduce the environmental impact of its operations, including increased use of renewable energy generation. In the Lake District we have already implemented a number of hydro schemes and have recently installed a trial Photo Voltaic installation at our South Lakes operational base near Conistown.

We would like to roll this out more widely across our bases, installing PVs at other bases and at our campsites. There are multiple opportunities for PV across the Lake District in sites that are not historically sensitive and thus will not conflict with our WHS status.

Energy generated by these installations will be used for our regular operations and also to charge our proposed new electric vehicles which form another project in this bid.

Under this project, we will install PVs at:

- 4 campsites – 20KW each
- Bowe Barn – 20KW
- Hilltop – 15KW
- Sizergh - 70KW ~~(See gate 1 Case included as Appendix 18)~~
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Sizergh scheme image (rendered). ~~For further images see Appendix 25.~~

In addition to the provision of PV systems, we will also provide battery storage at 2 properties, Boon Crag (Keswick) ~~(See Gate 2 Case included as Appendix 19)~~ and Sizergh Castle (near Kendal) to help even out demand, allowing energy to be drawn when the PV systems are not operating (e.g. during night).

Item	Timescale
Design and Procurement	June – December 2021
Appointment (Award of Contract)	April 2022
Construction Start Date	June 2022
Construction Completion	August 2022
Evaluation	September 2022 2

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In terms of key deliverables, the project will deliver (visitor aspirations impacted by Covid-19):

4. Requirements and ~~S~~specification for ~~E~~evaluation

The Lake District National Park Authority wish to appoint a third party to conduct evaluations of the projects delivered in the UK ESIF Funded Low Carbon Lake District programme. This tender will be for an:

Interim summative assessment and a final summative assessment.

The requirement for the evaluation is primarily to meet the UK ESIF Summative Assessment report requirements, which have the overarching aims of identifying; the successes, failures

and outcomes of the project, key lessons learnt, and recommendations for future improvements in the delivery of projects by the Authority.

Elements of both qualitative and quantitative research with stakeholders and data supplied by the Authority will be used in the construction of the evaluation. The bidder successful in receiving the contract will undertake the evaluation over two stages:

- [Interim Assessment](#)
- [Final evaluation Assessment](#)

[The mid-point interim assessment will help shape delivery of the final part of the projects.](#)

The evaluations will involve quantitative and qualitative assessments of the programme and tenderers must demonstrate a high level of understanding and experience of: devising and using both quantitative and qualitative methodologies, data collection and analysis, reporting complex information to both technical and non-technical stakeholders and assessing the reliability and validity of studies. Previous experience in several subject themes will also be of high importance:

- Appraisal of ERDF funded grant schemes
- Environmental and/or carbon emissions reporting.
- Transport and property carbon calculation experience.
- User and Business Survey experience.
- Experience of ERDF summative assessments.

The evaluation must comply with the requirements for summative assessments as detailed in the European Regional Development Fund 2014 to 2020 summative assessment guidance and appendices (August 2020~~19~~ and as updated). [Evaluation of the European Regional Development Fund 2014 to 2020 - GOV.UK \(www.gov.uk\)](#) ~~The~~ the evaluation will be supported by the appointed consultant until the summative assessment is agreed by MHCLG.

Confirmation of benchmarking methodologies will need to take place for the individual programmes at the outset of the evaluations.

Data sources for the evaluations will be;

- Benefits assessment undertaken to support Highway England match funding to the Southern Windermere Trail
- Initial survey information with businesses in Southern Windermere
- Follow up business survey information Southern Windermere
- User intercept surveys Southern Windermere
- Usage information from trail counters upon completion
- Carbon Assessment on the investments (specification and performance) at Ferry Nab

- Carbon Assessment sheets from ESIF low carbon grants review (specification and performance).
- A Subset of performance assessments including counter factual data sets for specification and performance based on historical energy usage.

Details of how data will be collected and in what form it will be available will be discussed with the successful bidder (questions regarding this may be sent to dannyhanna.cowardlatty@lakedistrict.gov.uk prior to submission of an application).

The evaluations will include a minimum of the following elements (bidders are expected to suggest additional work that they may undertake when producing the evaluation, and the Lake District National Park Authority reserves the right to make reasonable alterations to this list as the project progresses):

- Assess outcomes of the project against targets set by the ERDF programme requirements (as listed in Section 2).
- Determine the wider sustainability benefits of the Low Carbon Lake District programme:
 - CO₂e savings as stipulated by C34 (quantitative assessment).
 - The wider savings and benefits which may result from project activity, including plant and equipment maintenance and replacement savings, plant and equipment performance benefits, and workspace environment benefits (e.g. improved light or heat levels) (quantitative and qualitative assessment using stakeholder survey techniques).
 - Review the appetite for reducing carbon amongst businesses, and how this has changed over time (primary data will need to be collected questionnaire surveys to businesses engaged in the Low Carbon Lake District Partnership).
 - Financial analysis of savings through the Green Book Supplementary Appraisal Guidance for Valuing Greenhouse Gas Emissions and Energy Use.
- Determine the wider economic benefits arising from the programme, and determine Gross Value Added (GVA).
- Identify the effectiveness and impact of marketing activities (by the type of activity employed, marketing expenditure, referrals from suppliers and communication partners)
- A SWOT analysis based upon holistic data to cover all aspects of the scheme. A summary of the lessons learned through the delivery of the projects will included within this section.

5. Instruction to Applicants

5.1 You must be familiar with the requirements for summative assessments as detailed in the European Regional Development Fund 2014 to 2020 summative assessment guidance and appendices (April 2019 and as updated).

5.2 You must respond to every point raised in the Specifications (section 4).

5.3 You must complete the Quality Assessment (section 6).

5.4 You must complete the Supporting Information section (section 7).

5.5 You must complete the Pricing Schedule (section 8).

5.6 You must complete the Collusion Certificate (section 9).

5.7 In setting out this Invitation to Tender, the LDNPA has made every endeavour to provide bidders with an accurate description of LDNPA's requirements. This does not however, negate your obligations to fully familiarise yourselves with the nature and extent of the requirement and obligations arising and indeed to form your own conclusions about the methods and resources that are needed to meet these requirements.

5.8 You are strongly advised to study this document and to fully familiarise yourselves with the nature and extent of the requirements and all obligations required prior to submitting a quote/tender response.

5.9 Any information relating/supplied by LDNPA or otherwise acquired by you in connection with this Invitation to Tender shall be kept by you in strictest confidence.

5.10 You are advised that LDNPA is not bound to accept the lowest or any quote/tender response submitted, nor to reimburse any expense incurred during the process. In addition, LDNPA will not reimburse any expense or loss incurred by reason of this quotation process or any expense or loss incurred by you if you fail to submit a tender.

5.11 Should you be in any doubt as to the interpretation of any part of this document, you must raise a question with [Danny Coward](#)~~Hanna Latty~~ ([ESIF Low Carbon Coordinator](#)~~Programme Manager~~) concerning information on Low Carbon Lake District (dannyhanna.cowardlatty@lakedistrict.gov.uk) who will answer your query prior to the submission of your quote/tender response. The latest you can raise your query is no later than 3 days before the due date for the return of tender submissions. You are advised that where such enquiries have been made, and it is appropriate to do so, LDNPA will send a copy of the enquiry, with the answer, to all participants with anonymity preserved.

5.12 Only tenders submitted for the requirements which meets LDNPA's specifications in terms of timescale for delivery/performance/completion will be considered. Bidders shall include responses to all LDNPA's requirements and questions listed in this document.

5.13 Responses to this invitation to tender (ITT) must contain sufficient, accurate and clear details to allow LDNPA conduct a full and proper evaluation. Where details are provided by

you in literature that you submit in connection with the quote/tender response, you must ensure that clear cross-references are provided in your response.

5.14 LDNPA reserves the right to require additional information for clarification purposes following the submission of tenders at its discretion prior to tender evaluation.

5.15 You shall be deemed to have obtained all necessary and relevant professional advice and information for the completion of your tender response and to have allowed for all costs in the quote/tender response price. No claim or request for a variation shall be allowed at any time by reason of any failure to do so.

5.16 The supporting information, pricing schedule, form of contract, collusion certificate sections and your method statements must be completed, signed (where required) and returned as part of your tender submission, which may otherwise be rejected on grounds of non-compliance.

5.17 The electronic file(s) submitted should be in pdf format or readable with MS Office. LDNPA will endeavour to make every effort in opening your file(s), however in the event LDNPA cannot open the file(s), your submission may be rejected.

5.18 You may also attach documents to your quote/tender response for the purposes of answering the questionnaire only i.e. method statements but you must make clear cross references to the relevant parts of the specification.

5.19 Prices quoted in tender responses must remain valid for acceptance for a period of 3 months from the tender return date (section 6).

6. Evaluation Structure

Tenderers must comply with the requirements set out in section 5 and failure to do so will result in tender responses being eliminated from the evaluation process. The evaluation of tender responses will comprise of a single stages.

Tender Evaluation

Only tender responses which include information and evidence that meet all pass criteria (please see section 8) will be scored in terms of quality and price.

Quality and price scoring are based on the following criteria:

- *Quality Score (50%)*
 - Quality will be evaluated against pre-determined criteria with weightings as set below. Scoring will be applied by evaluators as set out below.
- *Price Score (50%)*
 - Pricing will be evaluated to ensure all relevant costs are visible and comparable, including sensitivity analysis where determined appropriate.

—The final ranking, a balance of the quality score (50%) and the price score (50%) will be determined as set out below:

—

—

Quality Score

Assessment	Score	Quality Scoring Gauge
Excellent	5	Exceeds requirement. Exceptional demonstration of the relevant ability, understanding, experience, skills, resources, and quality measures required to provide the supplies / services, with evidence to support the response.
Good	4	Satisfies the requirement with minor additional benefits. Above average demonstration of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.
Acceptable	3	Satisfies the requirement. Demonstration of the relevant ability, understanding, experience, skills, resources & quality measures required to provide the supplies / services, with evidence to support the response.
Minor Reservations	2	Satisfies the requirement with some minor reservations of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies / services, with little or no evidence to support the response.
Serious Reservations	1	Satisfies the requirement with major reservations of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies/services, with little or no evidence to support the response.
Unacceptable	0	Does not meet the requirement and/or insufficient information provided to demonstrate that the has the ability, understanding, experience, skills, resource & quality measures required to provide the supplies/services, with little or no evidence to support the response.

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The Evaluation Criteria and associated weightings to be applied in the evaluation are:

Evaluation Criteria	Weighting (%)
Has provided evidence to show that personnel performing the evaluation work have a high level of understanding and experience of: devising and using both quantitative and qualitative methodologies, data collection, and data analysis; statistical software packages; reporting complex information to both technical and non-technical stakeholders; and assessing the reliability and validity of studies.	20%
Has provided evidence to show that personnel performing the evaluation work have an understanding and experience of evaluating public sector funded programmes / projects / initiatives.	10%
References provided from at least two referees regarding evaluation work performed for them by the tendering organisation.	5%
Has provided details of how the tendering organisation manages its environmental impacts.	5%
Has provided details of how the tendering organisation manages equality and diversity.	5%
Has provided details of how the tendering organisation manages the quality of the services it delivers.	5%
Has provided a method statement stating how the requirements for the evaluation as set out in the specification are addressed.	15%
Has provided evidence to show that personnel performing the evaluation work have an understanding and experience of evaluating projects aimed at reducing CO ₂ e emissions and/or environmental, emission or sustainability-based projects.	25%
Has provided evidence to show that personnel performing the evaluation work have a high standard of report creation.	10%

Total	100%
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(Tenders' overall quality scores (from a total of 100% as set out above) will be multiplied by 50%)

Price Score

The lowest tendered price will be awarded 50%. All the other returned tender prices will be given a % score relative to this, by dividing the lowest tendered price by the firm's tendered price, multiplying by 100 and then multiplying the product by 50%.

Timetable

These dates are for planning purposes but maybe subject to change. You will be notified throughout the process of any changes with sufficient notice.

Please refer to section 9 which sets out the pricing schedule.

Process	Dates
Deadline for Tender submission	<u>24th June 2022</u> DATES
Notification	<u>1st July</u> April 2022 DATES
<u>Production of interim assessment reports</u>	<u>September 2022</u>
Production of final evaluation reports	<u>July 2024</u> DATES

Commented [DP1]: Iain/ Emma / Sharon should be able to help with the dates.

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7. Quality Assessment of Tender

All tenderers are asked to provide the following:

7.1 Please provide evidence to show that personnel performing the evaluation work have a high level of understanding and experience of: devising and using both quantitative and qualitative methodologies, data collection, and data analysis; statistical software packages; reporting complex information to both technical and non-technical stakeholders; and assessing the reliability and validity of studies.

7.1 Response:

7.2 Please provide evidence to show that personnel performing the evaluation work have an understanding and experience of evaluating public sector funded programmes / projects / initiatives.

7.2 Response:

7.3 Please provide evidence to show that personnel performing the evaluation work have an understanding and knowledge of the range of business support available and the understanding of the measurements of success for a business as well as project success.

7.3 Response:

7.4 Please provide the contact details of at least two referees for whom you have performed evaluation work, who will be able to provide a reference.

7.4 Response:

7.5 Please provide details of how the tendering organisation manages its own environmental impacts.

7.5 Response:

7.6 Please provide details of how your organisation manages equality and diversity

7.6 Response:

7.7 Please provide details of how the tendering organisation manages the quality of the services it delivers.

7.7 Response:

7.8 Please provide a method statement stating how you would address the requirements for the mid-term and finals evaluations as set out in the specification. ~~address~~Address the requirements for the final evaluation as set out in the specification.

7.8 Response:

7.9 Please provide evidence to show that personnel performing the evaluation work have an understanding and experience of evaluating projects aimed at reducing CO₂e emissions and/or environmental, emission or sustainability-based projects.

7.9 Response:

7.10 Please provide sample copies of previous evaluation reports or similar documents that you have recently completed (at least two examples).

7.10 Response:

8. Supporting Information

Please ensure that you complete the supporting information questionnaire as requested in full. We may ask to see documents at a later stage, so it is advisable you ensure they can be made available upon request.

Table 1) Tenderer Details

<i>[N.B. Failure to complete any of the sections in this table will result in your tender response being excluded from the remainder of the evaluation process]</i>	
Full name of organisation responding to this tender	
Registered office address	Company or charity registration number (if applicable, if not applicable state N/A)
	VAT registration number (if applicable, if not applicable state N/A)
	Name of immediate parent company (if applicable, if not applicable state N/A)
	Name of ultimate parent company (if applicable, if not applicable state N/A)
Type of organisation	i) a public limited company ii) a limited company iii) a limited liability partnership iv) other partnership v) sole trader vi) other (please specify)

Table 2) Contact Details

<i>[N.B. Failure to complete any of the sections in this table will result in your tender response being excluded from the remainder of the evaluation process]</i>	
Name	
Full postal address	
Phone/Mobile	
Email	

Table 3) Financial Information

Please tick and provide details of one of the following	
<i>[N.B. Answering 'No' to both options below or failure to supply supporting evidence (e.g. audited accounts, or a paper and supporting information) will result in your tender response being excluded from the remainder of the evaluation process]</i>	
I have included copies of the audited accounts for the most recent two years	Yes <input type="checkbox"/> No <input type="checkbox"/>
I have provided a paper and supporting information demonstrating my financial status (if trading for less than a year).	Yes <input type="checkbox"/> No <input type="checkbox"/>

Table 4) Insurance

Does your organisation have, or will it have appropriate insurances in place with at least £1m public liability and professional indemnity, and £1m employer's liability (if your company is an employer) in place prior to contract inception?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<i>[N.B. answering 'No' to this question will result in your tender response being excluded from the remainder of the evaluation process and consideration with respect to the evaluation contract(s).]</i>	

<p><i>Evidence of appropriate insurances will be required prior to contract inception. Failure to supply these in specified timescales will result in the tenderer being excluded from consideration regarding the evaluation contract(s)].</i></p>	
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9. Payment Schedule

Evaluation

Payment Schedule:

25% on submission of the draft version of the interim assessment report

25% on submission of the final version of the final interim assessment report

250% on submission of the draft version of the final evaluation

250% on submission of the final version of the final evaluation report

10. Collusion Certificate

By submitting my/our response, I/we _____ of certify that this is a bona fide quotation and that we have received same in good faith, without inducement or prior knowledge from any source whatsoever. We further confirm, indemnify, and undertake that in considering this quotation we have not: -

- entered into any agreement with any other person with the aim of preventing Quotations being made or as to the amount of any Quotation or the conditions on which any Quotation is made;
- informed any other person other than the person calling for these Quotations of the amount or approximate amount of the Quotation, except where the disclosure, in confidence, of the amount of the Quotation was necessary for insurance quotation or parental guarantee purposes required for the preparation of the Quotation;
- caused or induced any person to enter into such an agreement as is mentioned in paragraph (a) above or to inform me/us of the amount or approximate amount of any rival Quotation for the Contract.

In this certificate "person" includes any person or anybody of persons corporate or unincorporated and "agreement" includes any arrangement of whatever nature and in whatsoever form between us and any other party, and hereby indemnify LDNPA against any claim and or action arising from any breach of the aforesaid.

11. Return of Tender Application

Please return tender applications via the CHEST by close of business 24th June 2022

Within 7 days we will notify all interested parties. At this point we will enter into agreement with the successful supplier, this will be followed by a 10 day cooling off period ahead of contractual agreement and inception meeting.

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