



# KEYSTONE ACADEMY TRUST

## ICT Managed Service Partner Procurement

## Procurement Specific Questionnaire

February 2026

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# PSQ Explainer (for suppliers)

In the explainer below, the contracting authority is Keystone Academy Trust (a charitable company limited by guarantee (registered number 07788995 whose registered office is Westbourne Park, Bourne, Lincolnshire, PE10 9QS. Moxton Education are acting on behalf of the Trust in this procurement and should be considered part of the contracting authority's team.

Contact details for the Trust and Moxton Education are as follows:

## Keystone Schools

Tracey Roscher – [tracey.roscher@keystonemat.org](mailto:tracey.roscher@keystonemat.org)

## Moxton Education

Mark Simes – [mark.simes@moxton-education.com](mailto:mark.simes@moxton-education.com)

1. Public procurement is now governed by the Procurement Act 2023 and the Procurement Regulations 2024 to ensure that procurement delivers value for money, competition, transparency and integrity.
2. This Procurement Specific Questionnaire (PSQ) has been designed to help the contracting authority ensure that suppliers share the right information when participating in a procurement. This is separate from the formal tender submission (on how the supplier proposes to meet the tender requirements). The PSQ consists of three parts:
3. **Part 1 - confirmation of core supplier information:** suppliers participating in procurements will now be expected to register on a central digital platform (CDP). Suppliers can submit their core supplier information and, where a procurement opportunity arises, share this information with the contracting authority via the CDP. It is free to use and will mean suppliers should no longer have to re-enter this information for each public procurement but simply ensure it is up to date and subsequently shared. The CDP is available at <https://www.gov.uk/find-tender>. You will need to register for a Gov.uk One Login account to access this. Part 1 provides confirmation that suppliers have taken these steps.
4. **Part 2 - additional exclusions information:** procurement legislation provides for an 'exclusion regime' and a published 'debarment' list to safeguard procurement from suppliers who may pose a risk (for example, due to misconduct or poor performance). Suppliers must submit their own (and their connected persons<sup>1</sup>) exclusions information via the CDP. This includes self-declarations as to whether any exclusion grounds apply to them and, if so, details about the event or conviction and what steps have been taken to prevent such circumstances from occurring again.
5. As part of a procurement, a supplier will need to also share additional exclusions information for any suppliers that they are relying on to meet the procurement's conditions of participation. These could either be consortium members or key sub-contractors (but excludes any guarantors). These suppliers are 'associated persons' and their exclusions

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<sup>1</sup> Connected persons are persons who exercise (or have a right to exercise) significant influence or control over the supplier and those over which the supplier exercises (or has the right to exercise) significant influence or control. This includes majority shareholders, directors and shadow directors, parent and subsidiary companies and predecessor companies. The majority of the exclusion grounds state that they apply to the supplier or a connected person of the supplier.

information must be shared with the contracting authority. We recommend this is done by ensuring that your associated persons register, submit and share their information via the CDP (like the prime/main supplier).

6. In addition to the sub-contractors who are being relied on to meet the conditions of participation (who are associated persons), suppliers will need to share an exhaustive list of all their intended sub-contractors, which will be checked against the debarment list.
7. If a sub-contractor is not yet known at the start of the procurement (or brought in during it), this should be made clear by the supplier and relevant details of the sub-contractor should be provided once their identity and role is confirmed. This information should be shared with the contracting authority as soon as possible and at least by final tender stage.
8. **Part 3 - conditions of participation:** the contracting authority may set conditions of participation which a supplier must satisfy in order to be awarded a public contract. They can relate to the supplier's legal and financial capacity or their technical ability.
9. Some of the information requested in the PSQ will be for information purposes only. Other information will be assessed by the contracting authority. This might include a pass or fail mechanism, or a threshold which the supplier must meet. Under certain procurement processes, a contracting authority might use the information shared via the PSQ as part of a selection process to limit the number of participating suppliers. For example, inviting the five suppliers that submitted the highest scoring responses. Where this is the case, the contracting authority will outline the maximum number of suppliers, and the criteria used to select the limited number of suppliers, in their tender notice (section 20(4)(a) of the Procurement Act and regulation 19(2)(d) of the Procurement Regulations 2024).
10. Suppliers should note that the contracting authority has legislative duties to publish certain information which relate to the supplier in their contract award notices. This information includes, but is not limited to:
  - details of the winning supplier's associated persons
  - details of the winning supplier's connected person information
  - for certain procurements over £5 million, details of unsuccessful bidders
11. Freedom of Information and Procurement Act 2023  
We have legal obligations under both the Freedom of Information Act 2000 and the Procurement Act 2023 (and all subsequent related Statutory Instruments and replacement legislation). Accordingly, any information submitted to us may need to be disclosed in accordance with these Acts (including for example, grounds for exclusion).

# Notes for Completion

Should applicants have any questions regarding this pre-selection process or the information provided please submit them to Mr Mark Simes via e-mail, [mark.simes@moxton-education.com](mailto:mark.simes@moxton-education.com) and cc [tracey.roscher@keystonemat.org](mailto:tracey.roscher@keystonemat.org) or by telephone 0797 1177430. The closing date for applicants to submit questions is Midday on the 13<sup>th</sup> March 2026. The Trust will provide an electronic response to any questions by 5pm on the 20<sup>th</sup> March 2026 **or before**.

Completed Qualification Questionnaires, with all relevant additional information, must be submitted to the above addresses by **Midday on the 7th April 2026**. Submissions received after this date and time may not be accepted.

Please make sure that the subject line used in your submission email is exactly as follows, Moxton Education will send a confirmation email on receipt.

***Keystone Academy Trust – MSP PSQ Submission for [Company Name]***

**Suppliers are advised that failure to respond to all the questions within the PSQ and / or failure to submit any necessary supporting documents and / or failure of referees to respond to reference requests may render their submission non-compliant and as such they may not be considered for inclusion in the shortlist to continue to the next stage. Please ensure that you have pre-warned and obtained permission from your referees to be included and contacted.**

**The Contracting Authority will not contact Suppliers to provide missing information or corrections where there is an anomaly.**

# Background

The Trust website is: <https://www.keystoneacademytrust.org.uk/>

Keystone Academy Trust encompasses circa 2141 pupils across seven academies.

Keystone Academy Trust was established in September 2019 to provide primary education across South Lincolnshire. Our vision is 'Stronger Futures for all' including all of our children, families and our staff. We celebrate the uniqueness and individuality of all of our schools whilst supporting them to grow and develop to provide the best education and support for their communities

The Trust currently encompasses the following sites:

Name	Type	Pupil Numbers
Bourne Westfield	Primary	693
Long Sutton	Primary	431
Tower Road	Primary	561
Thurlby Community	Primary	205
Surfleet	Primary	64
Lutton St Nicholas	Primary	103
Cowbit St Mary C of E	Primary	84

## Our Vision

**A flourishing, open minded and resilient family of schools**

**INSPIRED BY OTHERS TO LIVE LIFE IN ALL ITS FULLNESS**

### Children Thrive

Academic progress and personal and spiritual development are prioritised through inspirational teaching and access to a sequential, inclusive and ambitious curriculum, bespoke to each school. As inquisitive, resilient learners, our children are well placed for their next phase of education and prepared to be global citizens and future custodians.

### Staff Wellbeing Is Paramount

**Staff appreciate the benefits of and celebrate belonging to the Keystone Academy Trust family.** The right for professional career development meets the individual requirements of all staff. The wellbeing of our staff is paramount.

### Transparent Leadership

**Leadership is transparent and drives inclusion and equity for all.** Championing and challenging in equal measure is valued at all levels, with the belief that all can contribute. Our leaders are stewards, privileged to lead and strengthen opportunities for future generations.

### Championing Communities

**Communities champion and support one another.** Our schools are at the heart of their locality, providing an open door for families, community groups and local faith groups. Schools facilitate effective collaboration, developing a strong sense of civic and moral duty within their local communities.

### **Developing Partnerships**

**Partnerships develop and strengthen trust.** In an ever-changing educational landscape, practice is strengthened for all stakeholders when we work collaboratively with others.

## **Our Values**

We are a family of schools with shared values that guide everything we do. We believe that education is more than just academic success – it's about developing character and building a strong, connected community.

### **Integrity**

*...whatever is true, whatever is honourable, whatever is just, whatever is pure... think about these things. **Philippians 4:8***

We distinguish right from wrong, being honest and transparent in our interactions with all.

### **Service**

*Two are better than one... for if they fall, one will pick up the other. **Ecclesiastes 4:9-10***

We make decisions that benefit others, utilising wisdom and openness to reflect on how we can support our school communities to flourish.

### **Resilience**

*For God gave us a spirit not of fear but of power and love and self-control. **2 Timothy 1:7***

We face challenging times together, nurturing positive relationships to achieve the best outcomes for all.

### **Compassion**

*Be kind to one another, tender-hearted, forgiving one another, as God in Christ forgave you. **Ephesians 4:32***

We champion the vulnerable, showing kindness and respect, leading to personal growth for all.

## **Our Strategic Priorities**

At Keystone Academy Trust, our mission is rooted in a commitment to excellence, equity and community. Our strategic priorities reflect a shared vision for nurturing, thriving learning environments, fostering ethical leadership and building resilient systems that support every

pupil, staff member and stakeholder. Each strategy is underpinned by core strands that guide daily practice and drive accountability. These foundational elements ensure that our vision of **Stronger Futures for All** is not only articulated but actively lived across the trust.

### **STRATEGY 1**

#### **Provide Excellence in Education for All**

Continue to embed a trust where learning thrives; every pupil and staff member have the support and resources they need to flourish. By working together and embracing innovation, we create a dynamic, inclusive and equitable learning experience for all.

### **STRATEGY 2**

#### **Ensure Strong and Effective Governance and Leadership**

Ethical leadership and governance continue to build trust with stakeholders and enhance the trust's reputation and long-term sustainability, building links with schools, faith communities, the diocese and other multi academy trusts. All who are involved in leadership and governance, at trust and school level, have the responsibility to uphold our vision, ensuring it is reflected in its policies, curriculum and activities.

### **STRATEGY 3**

#### **Effective Pupil, Family and Community Support**

Develop a shared responsibility for our pupils, achieved by working with families and communities. We encourage an understanding of the meaning and significance of faith, promoting values through the experiences we offer to all our pupils.

### **STRATEGY 4**

#### **Provide a Strong and Sustainable Infrastructure and Level of Service**

Creating efficient and sustainable systems which enables the delivery of equitable school experiences across all Keystone Academy Trust schools. Sustainable infrastructures create environmentally friendly and cost-effective educational environments.

## Procurement

This procurement has been initiated due to the need to have a single ICT Service across the Trust as a whole and the current contract due to expire in 21<sup>st</sup> December 2026.

The Trust is taking the opportunity to go to the market to identify the best innovative and forward-looking partner to support them in the delivery and development of their ICT provision over the next five years. The new service will be fully out-sourced and begin on the 22<sup>nd</sup> December 2026.

This procurement includes (but may not be limited to) the items listed below.

- A core managed service, management of all ICT against an agreed SLA
- 24 x 7 x 365 remote monitoring and management
- A Service Desk, available 42 weeks a year including out of hours access
- Local staffing which suppliers deem necessary to deliver the service and meet the SLA requirements 42 weeks onsite in schools and the Head Office
- Strategic advice and direction to the Trust regarding ICT
- Responsibility for design, specification, installation, and management of all ICT infrastructure
- Supply of goods and services based on an agreed Best Value approach
- Management of 3<sup>rd</sup> parties where relevant to the ICT support
- Relevant monitoring, management, patching
- Regular performance reporting
- CPD and training – digital skills and curriculum as necessary
- There is an expectation that the provider will support and/or drive innovation
- Maintain technical documentation
- Maintain operational documentation, for example inventory management and risk registers
- Collective partnership targets aligned to the Trust objectives
- Suppliers may be required to deliver a range of technology and change management projects in addition to the providing the core managed service.

Suppliers should note the following:

- The Trust will provide a standard contract as part of the ITT Pack
- There will be a requirement for TUPE from existing supplier.

The value of this procurement has been set with an upper limit of £1.5m over a maximum 60 month period.

To be clear, the upper limit noted above is a maximum value of the contract, not a budgetary figure. It includes

- The cost of the core managed service for the Trust
- An allowance for the life cycling of infrastructure and devices that may need replacing or lifecycling over the course of the contract
- An expectation of 30% growth in lifetime of the contract

In essence, this procurement is all about identifying a single supplier to provide a fully outsourced ICT managed service.

Further details regarding bid timescales are noted below but in terms of the managed service this is advertised as a 60 month contract with a maximum 5 year managed service with start and end dates as follows:

Service start date – 22<sup>nd</sup> December 2026  
 Service end date – 21<sup>st</sup> December 2031

The Trust gives no guarantee of the volume of work to be awarded under the contract and reserves the right to carry out work in-house.

## Timescales

We expect the following timeframes to be adhered to following the submission of the Initial selection questions. These timeframes are provided as indication only to support bidder planning and cannot be guaranteed.

<b>Keystone - Managed Service</b>	
<b>Tender Notice Published</b>	27th Feb
PSQ clarifications open	27th Feb
PSQ questions cutoff	13th March
Last date for Clarification responses	20th March
<b>(Easter Break 2nd to the 21st April)</b>	
<b>PSQ Submission deadline</b>	<b>7th April 12 midday</b>
PSQ Analysis sheet prepped/distributed	22nd April
Shortlist selection meeting - Online	29th April
<b>ITT meeting for shortlisted bidders</b>	<b>8th May</b>
Issue of ITT	8th May
Tender clarification open	8th May
Tender Clarification Close	22nd May
Last Date for clarification responses	29th May
<b>Tender Submission Deadline</b>	<b>12th June 12 midday</b>
Scoring Finishes	19th June
<b>Bidders Presentations</b>	<b>26th June</b>
<b>Trust Board - Authorisations complete by....</b>	<b>10th July</b>
Award Decision - Bidders notified	13th July
Contract Award Notice Published	13th July
Stand Still Start	13th July
Stand Still End	27th July
Contract Completion Period	8th September
Contract Details Notice posted	15th September
Transition & TUPE	Autumn Term
<b>Latests Service Start (End of Autumn Term)</b>	<b>21st December 2026</b>

# Conditions of Participation

The Trust will invite a minimum of the top 5 scoring suppliers to continue to the next stage. These shortlisted suppliers will be invited to participate in a group meeting and one-to-one meeting with the Trust to discuss the procurement and the Trust requirement, following which an ITT pack containing detailed requirements, a draft contract pack and other information will be provided.

Preference will be given to companies who can provide information in their responses about and references from organisations of a similar context and size to the Trust

These responses will be ranked by the Trust and a minimum of the top 5 companies shall form the basis of the shortlist of companies invited to tender for a 5-year Trust-wide Managed service, provided that they continue to express an interest to do so.

The objective of this PSQ process is to assess the responses to this questionnaire and select potential suppliers to proceed to the next stage of the procurement. Selection for inclusion in the next stage will be based on evaluation of the PSQ questions on the following criteria.

## *Technical capacity*

- Evidence of at least 5 years' experience in the provision of Managed Services to the Schools Education sector along with appropriate in-house systems, technical capability, and key personnel with good technical knowledge. This includes evidence of ability to deliver to contract standards drawn from references.

## *Economic and financial standing*

- Evidence of economic and financial standing in respect of viability to perform the services. Suppliers must be in a sound financial position and able to demonstrate appropriate financial capacity to perform the service to participate in a procurement of this size.

The Trust will apply the following financial test to a bidder's submission  
- annual turnover must be at least (i.e. a total of £5m)

If a bidder does not meet this criterion, then (at the Trusts discretion) they may not be shortlisted for inclusion in the next stage.

## *Other criteria*

- Suitable insurance cover. Public Liability to a minimum of £5,000,000 per occurrence, Employer's Liability to a minimum of £5,000,000. Professional Indemnity cover of at least £2,000,000 (or statements that these will be obtained if awarded the relevant contract(s)).
- A sound record of and clear policies of quality standards including, health & safety
- e-safety and equality policies are not required at this stage, but Suppliers may need to confirm they are available if chosen to be preferred bidder.

The Trust reserves the right not to select a potential contractor who has been assessed as having material weaknesses in one particular area covered by these initial selection questions, notwithstanding acceptable or even strong responses in all other areas.

The information supplied by applicants will first be checked for completeness and compliance with eligibility/exclusion requirements before responses are evaluated.

## Evaluation Guide

The Trust reserves the right to reject/disqualify any application that is incomplete or non-compliant.

**It is becoming common to get a large number of suppliers expressing interest by submitting a PSQ. As such, completeness and compliance will be strictly enforced, and any omissions or unclear answers are likely to result in exclusion. Suppliers will *not* be contacted for missing information.**

### Preliminary Questions

There must be answers for each question in the Preliminary Questions.

#### Part 1

There must be answers for each question in Part 1

#### Part 2

There must be answers for each question in Part 2

#### Part 3A

Question 13 is a pass/fail question and must be answered in the positive for a supplier to have a chance of being selected.

Question 14 is only needed if you are intending to use a guarantor. If this is the case, they must pass the same test detailed in Q13.

Questions 15-17 are pass/fail questions and must all be answered in the positive for a supplier to have a chance of being selected.

If a supplier successfully passes all the above evaluation conditions then they will be eligible for scoring. Scoring will be carried out as described below.

### Relevant Experience & Contract Examples

For Question 18, suppliers should provide contract examples (references)

- Contracts should have been performed during the past five years or be currently ongoing.
- The named contact provided should be prepared to provide written evidence to confirm the accuracy of the information provided. Please ensure you have gained their approval to put their organisation and name forward and please ensure your referees are aware they will be contacted by us
- References may not be taken up at PSQ stage, but the authority reserves the right to contact references at a later stage before any Preferred Bidder decision is made.
- Please provide references which are as similar in nature to the service which is being procured by the Trust. Please also ensure references are obtained from distinct organisations, i.e., not from under the same umbrella.
- References will be given a score from 0 to 5 based on their context in comparison to the Trust i.e. References from organisations that are similar in size and makeup to the Trust will score

higher than those that are different

Initial suitability of reference score:

Reference Organisation	Score
Trust of a similar type, makeup & size	5
Other Trust	4
School	3
Edu/not primary or sec	1
Commercial	0

### Worded responses (Questions 19a – 19e)

Each of these questions has a limit of 500 words. Images may NOT be used as part of the answer.

Please do not exceed the 500 word per section word limit – any answer exceeding 500 words or using images will be treated as non-compliant and will score 0.

The following scoring is applied for each question in this section:

	Score	Summary	Interpretation
Excellent	10	Very strong evidence of appropriate knowledge, skills or experience. Have confidence in their ability to deliver the required service but also add significant value.	Demonstrate a deep understanding of the requirement. All experience offered is detailed and linked directly to service requirements and show how they will be delivered and the impact that they will have on other areas/stakeholders. Relevant examples and/or case studies from organisations similar to the Trust are provided to support the answer.
Good	8	Sufficient evidence provided of appropriate knowledge, skills or experience. Have confidence in their ability to deliver the required service	Demonstrate a good understanding of the requirement. Experience will have been provided to show not only what will be provided but will give some detail of how this will be achieved. Reference has been made to case studies, though they may not be similar organisation to the Trust
Acceptable	6	Reasonable evidence of appropriate knowledge, skills or experience. Demonstrates experience in many areas but not all.	Demonstrate a good understanding of the requirement but will lack some clarity or detail in how the proposed solutions will be achieved. Evidence provided, while giving generic or general statements, is not specifically directed toward the aims/objectives of this answer

Minor Reservation	4	Some evidence of appropriate knowledge, skills or experience. Demonstrates experience in many areas but with important omissions	Will reflect that the bidder has not provided sufficient evidence to demonstrate they have experience in this area. Answers will in parts be sketchy with little or no detail given of how they have experience in this area. Evidence provided is considered weak or inappropriate and is unclear on how this relates to the question.
Serious Reservations	2	Very little evidence of appropriate knowledge skills or experience	Will reflect that there are major weaknesses or gaps in the information provided. The bidder displays poor understanding and there are major doubts about fitness for purpose.
Unacceptable	0	No evidence/response	Will result if no response is given and/or if the response is not acceptable and/or does not cover the required criteria.

**Summary of Scoring Guide**

Maximum score overall = 65

All scores indicated are for guidance purposes.

Evaluators will be free to apply intermediate scoring for any of the evaluation criteria

**For the avoidance of doubt, Questions 20 and 21 are not scored.**

# Procurement Specific Questions

No.	Question
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<b>Preliminary questions</b>	
------------------------------	--

1.	What is your name? (supplier name)
----	------------------------------------

.....  
**[Insert name]**

2.	<i>You must be registered on the central digital platform (CDP).</i>
----	--

What is your central digital platform unique identifier?

.....  
**[Insert unique identifier]**

3.	Please confirm if you are bidding as a single supplier (with or without sub-contractors) or as part of a group or consortium.
----	---

If you are bidding as part of a group or consortium (including where you intend to establish a legal entity to deliver the contract), please provide:

- a. the name of the group/consortium
- b. the proposed structure of the group/consortium, including the legal structure where applicable
- c. the name of the lead member in the group/consortium
- d. your role in the group/consortium (e.g. lead member, consortium member, sub-contractor)

.....  
**[Insert information]**

4.	<b>[Where applicable]</b> Please confirm which lot(s) you wish to bid for?
----	--

.....  
**N/A – there are no lots in this contract.**

5.	Are you on the debarment list?
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.....  
**[Insert Yes or No]**

**[If yes, insert details]**

## Part 1 – confirmation of core supplier information

6. You must submit up-to-date core supplier information on the CDP and **share this information with us by sending us a PDF copy submitted with this PSQ.**

This includes:

This includes:

- a. basic information
- b. economic and financial standing information
- c. connected person information (these are persons with the right to exercise, or who actually exercise, significant influence or control over the supplier, or over whom the supplier has the right to exercise, or actually exercises, significant influence or control over, for example: directors, majority shareholders and parent and subsidiary companies)
- d. exclusion grounds information

Please confirm you have shared this information with us.

-----  
**[Insert reference / file name]**

## Part 2 – additional exclusions information

### Part 2A – associated persons

7. Are you relying on any associated persons to satisfy the conditions of participation? (these are other suppliers who might be sub-contractors or consortium members but not a guarantor).

[The conditions of participation are outlined in Part 3]

If so, please complete **Q8, Q9 & Q10** (otherwise **Q8, Q9 & Q10** are not applicable).

-----  
**[Insert Yes or No]**

8. For each supplier/associated person, please confirm which condition(s) of participation you are relying on them to satisfy.

-----  
**[Insert name of supplier & brief description]**

**[Insert name of supplier & brief description]**

9. For each associated person, you must confirm they are registered on the CDP and have shared with us their information (either a share code or PDF download):

- a. basic information
- b. economic and financial standing information  
(if they are being relied upon to meet conditions of participation regarding financial capacity)
- c. connected person information
- d. exclusion grounds information

-----  
**[Insert name of supplier and reference / file name]**

10. Are any of your associated persons on the debarment list?

-----  
**[Insert Yes or No]**

**[If yes, insert details]**

## Part 2B – list of all intended sub-contractors

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11. Please provide:
- a list of all suppliers who you intend to sub-contract the performance of all or part of the contract to (either directly or in your wider supply chain)
  - their unique identifier (if they are registered on the CDP), or otherwise, a Companies House number charity number, VAT registration number, or equivalent
  - a brief description of their intended role in the performance of the contract

If you are not intending to sub-contract the performance of all or part of the contract, then this **question and Q12** are not applicable.

If a sub-contractor is unknown at the start of the procurement (or brought in during it), this should be made clear by the supplier and relevant details of the sub-contractor should be provided once their identity and role is confirmed. This information should be shared with the contracting authority as soon as possible and at least by final tenders.

-----  
**[Insert name of supplier – unique identifier – brief description]**

**[Insert name of supplier – unique identifier – brief description]**

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12. Please confirm if any intended sub-contractor is on the debarment list.

The debarment list can be found here [The National Security Unit for Procurement - GOV.UK](#)

-----  
**[Insert Yes or No]**

**[If yes, insert sub-contractor(s) name and provide details]**

**Part 3 – questions relating to conditions of participation**

**Part 3A – standard questions**

Financial capacity

13. Suppliers should have an annual turnover of at least £5m as described earlier in this PSQ.

Is your annual turnover greater than £5m

-----  
**[Insert Yes or No]**

- 
14. Are you relying on another supplier to act as a guarantor?

If so, please provide their name and evidence of their economic and financial standing.

-----  
**[Insert Yes or No]**

**[If yes, insert reference / file name]**

- 
15. Please confirm whether you already have, or can commit to obtain, prior to the award of the contract, the levels of insurance cover indicated below:

- a. Employer’s (Compulsory) Liability Insurance\* = £5,000,000
- b. Public Liability Insurance = £5,000,000
- c. Professional Indemnity Insurance = £2,000,000
- d. Product Liability Insurance = £2,000,000
- e. Cyber Liability Insurance = £2,000,000

There is a legal requirement for certain employers to hold Employer’s (Compulsory) Liability Insurance of £5 million as a minimum. See the Health and Safety Executive website for more information: [www.hse.gov.uk/pubns/hse39.pdf](http://www.hse.gov.uk/pubns/hse39.pdf).

-----  
**[Insert Yes or No]**

**[Insert details of your insurances already in place]**

**[Insert details of your insurances which would be obtained following contract award (including information on how you will obtain this insurance – e.g. a quote)]**

- 
16. Please confirm that you have in place, or that you will have in place by the award of the contract, the human and technical resources to perform the contract to ensure compliance with the UK General Data Protection Regulation and to ensure the protection of the rights of data subjects.

Please provide details of the technical facilities and measures (including systems and processes) you have in place, or will have in place by contract award, to ensure compliance with UK data protection law and to ensure the protection of the rights of data subjects. Your response should include, but should not be limited to facilities and measures:

- to ensure ongoing confidentiality, integrity, availability and resilience of processing systems and services
- to comply with the rights of data subjects in respect of receiving privacy information, and access, rectification, deletion and portability of personal data
- to ensure that any consent based processing meets standards of active, informed consent, and that such consents are recorded and auditable
- to ensure legal safeguards are in place to lawfully transfer personal data outside the UK (if such transfers will take place)
- to maintain records of personal data processing activities
- to regularly test, assess and evaluate the effectiveness of the above measures

-----  
**[Insert Yes or No]**

**[Insert information]**

#### Organisational Standards

17. **Organisational standards**

Where conditions of participation have specified organisational qualifications or standards, please provide details of how these are met, or other equivalent standards that equal or exceed what has been requested.

-----  
17a

That you have systems in place to acquire **Enhanced** DBS clearance checks (including Barred List checks) for your personnel and that you would be confident at completing the safeguarding checklist (see Annex A) for each individual team member **prior to contract commencement date** – staff will not be allowed on site without the correct documentation being sent to sites beforehand

-----  
**[Insert Yes or No]**

-----  
17b

That you have a means to provide your personnel with company logo's **photo id** badges to be worn at all times whilst on education site(s) and that these badges incorporate a DBS clearance number and date this was issued

-----  
**[Insert Yes or No]**

-----  
17c

That your organisation has one of the following accreditations:  
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ISO 27001

**[Insert Yes or No]**

Cyber Essentials

**[Insert Yes or No]**

Cyber Essentials Plus

**[Insert Yes or No]**

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## Technical ability

### 18. **Relevant experience and contract examples**

Please provide details of three contracts to meet conditions of participation relating to technical ability set out in the relevant notice or procurement documents.

The examples must be from the past three years and should be from similar organisations to the contacting authority. (Please refer to the guidance notes above)

The named contact provided should be prepared to provide written evidence to confirm the accuracy of the information provided.

For consortium bids, or where you have indicated that you are relying on an associated person to meet the technical ability, you should provide relevant examples of where the associated person has delivered similar requirements. If this is not possible (e.g. the consortium is newly formed, or a special purpose vehicle is to be created for this contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or members of the special purpose vehicle or sub-contractors (three examples are not required from each member).

If you cannot provide at least one example of previous contracts, please provide an explanation for this and how you meet the conditions of participation relating to technical ability.

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---

**Contract 1**

<b>Name of customer organisation who signed the contract</b>	[Insert information]
<b>Name of supplier who signed the contract</b>	[Insert information]
<b>Point of contact in the customer's organisation</b>	[Insert information]
<b>Position in the customer's organisation</b>	[Insert information]
<b>Email address</b>	[Insert information]
<b>Description of contract</b>	
[Insert information]	
<b>Contract start date</b>	[Insert information]
<b>Contract completion date</b>	[Insert information]
<b>Estimated contract value</b>	[Insert information]

**Contract 2**

<b>Name of customer organisation who signed the contract</b>	[Insert information]
<b>Name of supplier who signed the contract</b>	[Insert information]
<b>Point of contact in the customer's organisation</b>	[Insert information]
<b>Position in the customer's organisation</b>	[Insert information]
<b>Email address</b>	[Insert information]
<b>Description of contract</b>	
[Insert information]	
<b>Contract start date</b>	[Insert information]
<b>Contract completion date</b>	[Insert information]
<b>Estimated contract value</b>	[Insert information]

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### Contract 3

Name of customer organisation who signed the contract	[Insert information]
Name of supplier who signed the contract	[Insert information]
Point of contact in the customer's organisation	[Insert information]
Position in the customer's organisation	[Insert information]
Email address	[Insert information]
<b>Description of contract</b>	
[Insert information]	
Contract start date	[Insert information]
Contract completion date	[Insert information]
Estimated contract value	[Insert information]

**If you cannot provide at least one example of previous contracts that are relevant to the requirement, in no more than 500 words please provide an explanation for this and how you meet the conditions of participation relating to technical ability e.g. your organisation is a new start-up or you have provided services in the past but not under a contract.**

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#### 19 **Supplier Experience.**

Please confirm each of the following by providing the required information in the boxes below each question. There is a maximum of 500 words for each individual answer. Images or links to web pages/external information may NOT be used in the answers.

Any answers over 500 words or using images will be non-compliant and will score 0.

19a

That your organisation has recent experience of delivering a Schools Trust Managed ICT Service

-----  
**[Insert information]**

19b

That your organisation has recent experience in a Trust context of integrating new schools into an existing service.

-----  
**[Insert information]**

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19c

That your organisation has recent experience of an ICT service transfer from an existing provider (internal or external).

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**[Insert information]**

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19d

That your organisation has experience of working with Trusts at a strategic level to deliver a technical solution that meets and adapts to the needs of a Trust in relation elements including (but not limited to) Teaching & Learning strategies, pedagogical approaches, curriculum delivery and safeguarding strategy.

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**[Insert information]**

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19e

That your organisation has experience managing formal contracts with educational organisations, including service reporting, project planning and programme management holistically across multiple workstreams and sites.

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**[Insert information]**

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**20. Experience of sub-contractor management**

Where you intend to sub-contract a proportion of the contract, please demonstrate how you have previously maintained effective supply chains with your sub-contractor(s) (which may be the intended sub-contractor(s) for this procurement, or any others used previously).

The description should include the procedures you use to ensure performance of the contract.

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**[Insert information]**

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**21. Health and safety**

Please describe the arrangements you have in place to manage health and safety effectively and control significant risks relevant to the contract (including risks from the use of contractors, where relevant).

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**[Insert information]**

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## Confirmations

22. I confirm that:

- to the best of my knowledge the answers submitted, and information contained in this document are complete, accurate and not misleading
- upon request and without delay I will provide any additional information requested of us and I will update the contracting authority promptly if there is any material change to the answers given during the procurement process
- I understand that the response to this questionnaire will be used to assess whether our organisation is entitled to participate in, or continue to participate in, this procurement
- I understand that our organisation may be excluded from the procurement if requested information has not been provided, if any of this response or any follow up responses are incomplete, inaccurate or misleading, if confidential information has been accessed or if we have unduly influenced your decision-making in this procurement

-----  
**[Insert Yes or No]**

**Signed**

**Date**

**Name**

**Role**

**Phone number**

**Email**

**Postal address**

Please note that we will use the above name and contact details for all correspondence.