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| **QUOTATIONS TO BE RETURNED TO:**  <https://in-tendhost.co.uk/tamworthbc> | **Invitation Date: 16 May 2025** |
| **IN THE EVENT OF ANY QUERIES, PLEASE USE THE CORRESPONDENCE FACILITY ON THE IN-TEND PORTAL** |

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| **INSTRUCTIONS TO PROVIDERS**  1. Quotations are requested for the provision of a Local Plan Scoping Report of the Sustainability Appraisal.  2. Quotations **MUST** be made in either pdf format or in a format which is compatible with Office 365 and documents submitted electronically via the in-tend portal at <https://in-tendhost.co.uk/tamworthbc> by:   1. **NOON on Friday 13 June 2025.** 2. Any problems uploading submissions **MUST** be reported to the Corporate Procurement Team (Tel: 01827 709371 Email: [procurement@tamworth.gov.uk](mailto:procurement@tamworth.gov.uk) before the submission deadline. Where a provider (the ‘Provider’) of a supply and/or service is unable to upload their submission and the report of the problem is received after the submission deadline, this will result in the disqualification of the submission. 3. Providers must complete the attached price schedule and provide any attached additional information requested. 4. The Provider agrees and accepts that any Quotation submitted by the Provider shall remain open for acceptance for a period of ninety (90) days from the closing date for the receipt of Quotations, and shall not alter, amend, vary or withdraw without the prior written agreement of Tamworth Borough Council (the ‘Council’). 5. Quotations other than on this form will not receive consideration. The Council reserves the right to disqualify Quotations received where the Quotation does not comply with the Specification or any other conditions as stated in the Invitation to Quote (ITQ) document and/or; does not include all documentation or information requested/required by the Council as stated in the ITQ document and/or; requires or implies any variation to the terms and conditions of the contract (the ‘Contract’) as set out in the ITQ document and/or includes Prices and/or Rates which are stated in the Provider’s Quotation as being subject to variation or are uncertain, imprecise or not presented in the form prescribed in the ITQ document. 6. The Council is not obliged or bound to accept the lowest or any Quotation. 7. The Council’s General Conditions of Contract for Provision of Services will apply to any subsequent Contract. Providers may view the Terms & Conditions on the Council’s website at <http://www.tamworth.gov.uk/budgets/spending/tenders-and-contracts>. Providers accept that by responding to this ITQ and in the event their Quotation is accepted, they will enter into and execute a Contract subject to the Terms and Conditions of Contract without amendment, deletion or addition. Providers also accept that by responding to this ITQ they are accepting that the Terms and Conditions of the ITQ and any subsequent Contract are in all circumstances fair and reasonable in all respects and the contractor (the ‘Contractor’) shall be bound by the Terms and Conditions of the Contract forthwith and with effect from the Commencement Date of the Contract. 8. Any correspondence or request for clarification related to this ITQ must be submitted in writing via the Correspondence facility on the In-tend portal. Any such requests must be made at least ninety-six (96) hours prior to the submission return time and date deadline. Queries and/or requests for clarification will NOT be answered after the 4 day deadline. Replies will be sent to all Providers as a Clarification Notice via in-tend, although the anonymity of the person raising the query will be maintained.   10. The Council is responsible for determining the IR35 status of a contractor where they fall under the definition of a personal services company, and will be required to deduct tax at source, including Pay As You Earn (PAYE) and National Insurance (NI), through the Real Time Information (RTI) system where appropriate. |

1. **Introduction**

The Council is seeking to engage a specialist consultant to produce a formal Scoping Report, in accordance with the Environmental Assessment of Plans and Programmes Regulations 2004 and supporting government guidance. The project will set out Stage A of the Sustainability Appraisal (SA) of the emerging Tamworth Borough Council Local Plan 2022-2043, which is currently in the early stages of preparation.

The key purpose of the project is to define the context and technical scope of the SA. This involves establishing an appropriate methodology for the appraisal, and the identification of suitable sustainability objectives against which policies and site allocations can be iteratively assessed. The Scoping stage will be key to demonstrating that the likely significant effects of Tamworth’s new plan have been appropriately taken into account, and as such, will form an important part of the supporting evidence base.

The following Invitation to Quote is for the completion of Stage A only. Although a discrete piece of work, the key outputs of this project will directly underpin the subsequent stages of the SA (Stages B-E), which the Council are intending to undertake internally.

1. **SPECIFICATION**

**Local Context**

Tamworth is a compact urban borough located on the southeastern corner of Staffordshire and the northeastern periphery of the West Midlands. It is bordered by two neighbouring authorities, adjoining Lichfield District to the north and the west and North Warwickshire District to the east and the south. The borough encompasses a single large town with a population of around 80,263 people.

Tamworth is one of the smallest local authorities in England, with a total land area of only 3,085 hectares (11.91 square miles). Its compact land area is very densely populated, with around 25.5 residents living in every hectare. Much of the borough has already been developed in some way, and this has resulted in a predominately urban landscape with limited areas of countryside.

**Local Plan**

The current local plan for Tamworth was adopted in 2016 and covers the period 2006 to 2031. In March 2020, officers conducted a review of the existing local plan which concluded that, although the plan remained generally in accordance with national policy and was performing relatively well, a number of changes would be required. The extent of these changes were deemed significant enough to warrant the production of a new plan for the borough.

Following the review, work commenced on the preparation of Tamworth’s new plan, with the Issues and Options Paper published for consultation in September 2022. However, any further progress of a significant nature was delayed, on account of uncertainties regarding the proposed overhaul to the plan-making system.

In February 2024, the Council’s Cabinet resolved to press ahead with the project to deliver a new local plan under the current plan-making system. We are therefore proposing to submit a new local plan for examination before the end of December 2026, in line with the Government’s current transitionary arrangements. Work has since resumed on local plan production, with multiple pieces of evidence currently in the process of being procured and collected. Given the revised timetable, it is key that the Scoping stage of the SA be undertaken in an agreed and timely manner to enable the latter appraisal stages to commence.

**Requirements**

The Council want to commission a consultant to provide a robust Scoping Report, which incorporates the requirements of the Environmental Assessment of Plans and Programmes Regulations 2004. The report must satisfy all requirements associated with Stage A of the SA process and be prepared in accordance with the relevant national guidance.

The key requirement of this project is to appropriately define the context, scope and methodology of the SA of Tamworth’s new local plan. Although a discrete piece of work, the project must provide a sound basis for the subsequent stages of the SA (Stages B-E) to be undertaken by the Council. This involves providing a clear means of assessing the sustainability impacts of proposed local plan policies, allocations and strategic options for growth, including all reasonable alternatives.

The broad parameters of the project are sequenced below. The report must also clearly set out how a Strategic Environmental Assessment (SEA) has been integrated into the process, by identifying how the requirements of the Environmental Assessment of Plans and Programmes Regulations 2004 are being fulfilled. In producing the work, the following stages must be undertaken:

* **Review of relevant plans, policies and programmes, and sustainability objectives**

This should involve the consideration of all relevant plans, policies, programmes and objectives at an international, national, regional and local level, and reference the relevant issues that the new local plan may need to consider.

* **Collect, analyse and summarise the baseline**

This should include a comprehensive description of the existing environmental, economic and social characteristics of the area likely to be affected by the new plan. Wherever possible, this should also include data on historic and likely future trends, including the anticipated situation should no new policies be introduced. Any gaps in the data should also be identified where necessary.

* **Identify the sustainability issues and problems**

This should identify issues that are of relevance to the development of the new local plan.

* **Develop the SA Framework, including sustainability objectives**

This should be suitable to guide the Council in its appraisal of the local plan. It should be clear, transparent and straightforward for the Council to apply themselves, supported by the inclusion of indicators/decision-making criteria.

* **Consult on the scope of the SA**

The draft report must be consulted on in accordance with the requirements of Regulation 12 (5) of the Strategic Environmental Assessment Regulations. The Council may also wish to consult other internal stakeholders. Although the Council will coordinate the consultation, the consultant will be required to review all comments and make any necessary amendments before releasing the final report.

In order to align with the current local plan delivery timetable, the Council would be seeking for the consultation period to commence by July/August 2025, with further work to finalise the report carried out after this has been completed.

The key aim of this project is to establish the context and determine the technical scope of the SA of the emerging Tamworth Borough Council Local Plan 2022-2043. The key output is an appropriate methodology, including a set of sustainability objectives and suitable framework, against which the Council can appraise the sustainability of all aspects of the new plan. This should be clear and transparent and provide the Council with a sound basis for selecting and justifying preferred approaches in the latter stages of appraisal.

The project should be provided in a well-structured and robust report, with all aspects capable of standing up to scrutiny at public examination. It should consist of the following iterations:

* A **Draft Scoping Report** to be prepared for consultation; and
* A **Final Scoping Report**, which takes into account any comments received during the consultation period.

The final report should be provided in an electronic format that is suitable for publication on the Council’s website. In this respect, it should be an accessible format that meets the requirements of the Public Sector Bodies (Websites and Mobile Applications) (No.2) Accessibility Regulations 2018.

Whilst the following additional outputs are excluded from the invitation to quote at this stage, if required they may be commissioned in the future. Current approximate hourly/daily rates for the undertaking of the below should be provided for reference but will not be scored as part of the assessment of bids for the other works listed within this specification.

* Consultants should be prepared to hold a seminar for Elected Members on the completion of the report if requested; and
* Consultants should be prepared to attend an examination if required to do so to defend the scope of the SA and support the Council.

**EVALUATION GUIDANCE**

**What MUST be submitted by the Provider with their Quotation?**

Providers must include the following when submitting their Quotation:

1. A completed Price Schedule.
2. A completed Additional Information Required form.
3. Sufficient information and detail to address the requirements described below under Section 2 – Quality for each listed criterion. Failure to provide the required information with your Quotation will result in your submission losing marks.
4. Sufficient information and detail to address the requirements described below under Section 3 – Social Value. Failure to provide the required information with your Quotation will result in your submission losing marks.

**Evaluation Procedure & Guidance**

The evaluation process will identify the most advantageous Quotation and the Contractor will be selected on this basis and the Contract awarded. As stated in paragraph 7 of the Instructions to Providers, the Council is not obliged or bound to accept the lowest or any Quotation.

The criteria to be used by the Council in the evaluation process will be those set out below which include:

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| **ITEM** | **CRITERIA** | **WEIGHTING** |
| **1** | **Price** | **15%** |
| **2.** | **Quality** | **80%** |
| **3.** | **Social Value** | **5%** |

1. **PRICE**

The overall weighting for Price is 15%. This will be evaluated using the following methodology:

Lowest Quoted Price x Weighting = Score

Quoted Price

1. **QUALITY**

The overall weighting for Quality is 80%. This has been further broken down into the questions and weightings below.

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| **Q1. Project Delivery - Methodology** | **Weighting 20%** |
| Please explain your intended approach to delivering the project to meet the requirements of the specification. Your response should include, but not be limited to:   * Your intended approach to delivering the project. * a description of the key risks to the successful delivery of the project and your mitigation proposals.   **Assessment Criteria**  **The level of which the Contractor has demonstrated and evidenced (including the use of Case Studies where relevant):**   * Clear, detailed, realistic proposals providing reassurance that all aspects of the project will be met. * Response demonstrates an understanding of the requirements set out in the specification. | |
| **Please respond below in no more than 1000 words** | |

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| **Q2 Project delivery – Delivery Plan** | **Weighting 20%** |
| Please explain your intended delivery plan for the project including a timetable of key milestones and meetings. Please outline what you envisage are the key risks to the successful delivery of the project and your mitigation proposals.  **Assessment Criteria**   * Clear, detailed, realistic proposals providing reassurance that all aspects of the project will be met. * Delivery Plan * Response demonstrates an understanding of key risks with effective proposals to mitigate | |
| **Please respond below in no more than 500 words** | |

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| Q3. Key Personnel, Staffing, Capacity and Experience to Deliver the project | **Weighting 15%** |
| 1) Please identify the key personnel who will be involved in the delivery of the contract detailing as a minimum the relevant qualifications, experience and competencies of each individual and how they will utilise previous experience and specific competencies to ensure successful delivery of the project and add value to the project.  2) Please outline how your team will be organised and managed to ensure a successful high-quality delivery of the contract, including details of how you will ensure that sufficient resource is allocated to this contract and how this project fits into the current commitments and workload of the proposed team. Please identify who will be the Contract Lead.  Tenderers must clearly demonstrate and evidence the following within their response:   * The proposed delivery team have the relevant qualifications, skills, and competencies to ensure successful delivery of the contract within the timescale. * Clear and effective organisational structure identified and outlined demonstrating robust team management. * Capacity to deliver and effective workload management and resource allocation providing confidence that the contract lot can be delivered within the timescales. | |
| **Please respond below in no more than 1000 words** | |

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| **Q4 Business Continuity** | **Weighting 10%** |
| Please explain how you will ensure contract delivery will remain on target and a quality service will be maintained in the event of unavailability of key personnel (for example in the event of staff illness) or in respect of areas where expertise within your company may be lacking.  **Assessment Criteria**   * Clear contingency arrangements in place to ensure unavailability of personnel will not impact on contract delivery and meeting the required targets. * Proposals are clear, realistic and provide reassurance adequate arrangements will be in place. | |
| **Please respond below in no more than 500 words** | |

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| **Q5 Case Studies** | | **Weighting 15%** |
| Please provide details of up to two contracts, to meet the technical and professional ability criteria set out in the ITQ documents, in any combination from either the public or private sector; voluntary, charity or social enterprise (VCSE), that are relevant to our requirement. VCSEs may include samples of grant-funded work. Where this procurement is for supplies or services, the examples must be from the past three years.  The named contact provided should be able to provide written evidence to confirm the accuracy of the information provided below.  **For each contract, please provide the following information:**  ***Assessment Criteria:***   * Response provided including all information, * Examples are relevant in size & nature to the service outlined in the specification and demonstrates delivery of similar projects. * Track record of successful delivery | | |
| **Example 1** | | |
| **Name of customer organisation** |  | |
| **Point of contact in the organisation** |  | |
| **Position in the organisation** |  | |
| **E-mail address** |  | |
| **Description of contract (in no more than 300 words)** |  | |
| **Contract Start date** |  | |
| **Contract completion date** |  | |
| **Estimated contract value** |  | |
| **Example 2** | | |
| **Name of customer organisation** |  | |
| **Point of contact in the organisation** |  | |
| **Position in the organisation** |  | |
| **E-mail address** |  | |
| **Description of contract (in no more than 300 words)** |  | |
| **Contract Start date** |  | |
| **Contract completion date** |  | |
| **Estimated contract value** |  | |

Each criterion will be marked on a scale of 0 to 5. The table below sets out how these marks are allocated:

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| **0** | **Unacceptable** | Unable to assess due to the lack of evidence/unsatisfactory level of detail provided. The proposal does not demonstrate an understanding of the Council’s requirements and issues with the proposal either being non-compliant or with a major risk that the intended outcomes/ performance standards will not be achieved and delivered |
| **1** | **Poor** | The proposal demonstrates extremely limited understanding of the Council’s essential requirements, with a significant risk that the majority of the intended outcomes/ performance standards will **not** be achieved and delivered with the level of evidence in support of the proposal deficient in the majority of areas. Proposal shows significantly more weaknesses than strengths. |
| **2** | **Concern** | The proposal demonstrates some understanding and addresses some of the Council requirements. There is a risk that some of the intended outcomes/ performance standards will **not** be achieved and delivered with the level of evidence in support of the proposal deficient in certain areas and requires the reviewer to make assumptions. Proposal shows a balance of weaknesses and strengths. |
| **3** | **Acceptable** | The proposal demonstrates reasonable understanding of all or most of the Council requirements and issues and provides an acceptable degree of confidence that all or most of the intended outcomes/ performance standards will be achieved and delivered with an acceptable level of evidence in support of the proposal, but with some minor reservations. Proposal shows more strengths than weaknesses. |
| **4** | **Good** | The proposal demonstrates a good understanding of all of the Council’s essential requirements and issues and provides a high degree of confidence that all or most of the intended outcomes/ performance standards will be achieved and delivered with the level of evidence in support of the proposal fully meeting expectations. |
| **5** | **Excellent** | An excellent response which demonstrates a comprehensive understanding of all of the Council’s essential requirements and issues and providing an exceptional degree of confidence that all or most of the intended outcomes/ performance standards will be achieved and exceeded in most respects with the level of evidence in support of the proposal exceeding expectations and demonstrating clear and strong evidence of delivery. |

Once marked, each response to the criterion shall have its score calculated as follows:

Mark Awarded x Weighting (%) = Score

Maximum Mark Available

1. **Social Value**

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| **Q1 Social Value** | **Weighting 5%** |
| The Council is actively seeking providers who share their commitment to proactively deliver social value to the Borough. Bidders are free to choose those measures that are proportional and relevant to their business and this contract from the attached Social Value Priorities and Pledges document.  **Assessment Criteria**   * Proposals are clear, realistic and provide reassurance that the provider has a credible process in place to deliver the pledges being offered. * Any pledges promised will need to be evidenced throughout the term of the contract. The Provider must detail how they will measure the pledges and report back to the Council. | |
| **Please respond below in no more than 500 words** | |

Responses for Social Value will be marked on a scale of 0 to 5. The table below sets out how these marks are allocated:

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| **Score** | **Rating** | **Rationale** |
| **0** | **Unacceptable** | **Does not meet the requirement. Does not comply and/or provides insufficient information to demonstrate that the bidder has the understanding or ability to deliver social value commitments.** |
| **1** | **Very Poor** | **Significant reservations regarding the bidder's understanding and ability required to provide social value, with little or no ' evidence to support the response** |
| **2** | **Concern** | **Some reservations regarding the bidder's understanding and ability required to provide social value with minimal evidence to support the response** |
| **3** | **Acceptable** | **Satisfies most aspects of the requirement. The response demonstrates the commitment, understanding and ability required to deliver social value, with evidence to support it and where the evaluator has reservations, these are minor in nature** |
| **4** | **Good** | **Satisfies all or almost all aspects of the requirement with good clarity. The response demonstrates the understanding, relationships and ability required to deliver social value. The response clearly identifies clear local responses and provides a clear action plan for delivery. Whilst there may be slight deficiencies in some areas these do not detract from the overall solution offered.** |
| **5** | **Very Good** | **Satisfies all aspects of the requirement. The response demonstrates exceptional local awareness, understanding and ability required to deliver social value. Response identifies factors that will offer a clear lasting legacy locally with a robust local action plan** |

Once marked, each response to the criterion shall have its score calculated as follows:

Mark Awarded x Weighting (%) = Score

Maximum Mark Available

**PRICE SCHEDULE**

1. A fixed price is envisaged for this project. All Prices shall be exclusive of Value Added Tax but must include all charges, costs, disbursements and expenses (including, without limitation, all costs and charges for labour, parts, materials, travelling and other expenses, all relevant taxes, other than Value Added Tax, duties and other relevant and applicable sums). Payment for the Services shall be made by the Council to the successful Contractor on completion of the Services. Provided that the Services have been properly delivered to and accepted by the Council, payment shall be due twenty-eight (28) days from the date of receipt and acceptance of correct invoice documentation by the Council. Invoices must be e-mailed to [creditors@tamworth.gov.uk](mailto:creditors@tamworth.gov.uk) and **MUST** clearly state the Contract Number together with the relevant Purchase Order Number at that time.

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| **Item** | **Description** | **Unit Price (excl VAT)**  **(£’s)** | **Less any Discount** | **Item Total Price**  **(excl. VAT)**  **[£’s]** |
|  |  |  |  |  |
|  |  |  |  |  |
| **TOTAL PRICE** | | | |  |

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| We hereby offer to provide the services at the prices stated on this and any attached forms in accordance with Tamworth Borough Council’s General Conditions of Contract for Provision of Services. | | |
| Signed: | | Date: |
| Full Name: | | Designation: |
| Company Name: | | |
| Company Address: | | |
| Tel No. | E-Mail Address: | |

For all specified work above and where work is agreed as additional but within the scope of the Contract by the Council, please supply the following hourly and daily rates (daily rates shall be based on a 7.5 working hour day) for the services specified below:

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| **Professional Staff** | **Hourly Rate**  **£’s (excl. VAT)** | **Daily Rate**  **£’s (excl. VAT)** | **Hours**  **Per Day** |
| Senior Consultant |  |  |  |
| Consultant |  |  |  |
| Other *(please specify):* |  |  |  |
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**ADDITIONAL INFORMATION REQUIRED**

Please ensure that all questions are completed in full and in the format requested. Providers may attach details to their Quotation but please ensure they keep to the following format.

Whilst reserving the right to request information at any time throughout the procurement process, the Council hereby enables the Provider to self-certify in their Quotation submission that they comply with the requirements listed below. Providers who self-certify that they meet these requirements may be required to provide evidence of this if they are successful at contract award stage. If the relevant documentary evidence is not provided upon request and without delay, we reserve the right to amend the contract award decision and award to the next compliant bidder.

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| Please self-certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated below: | |
| Employer’s (Compulsory) Liability Insurance\* = £10,000,000 | YES/NO |
| Public Liability Insurance = £5,000,000 | YES/NO |
| Professional Indemnity Insurance | N/A |
| \* *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.* | |

**Please note that a failure to answer “Yes” to the above questions may result in your tender being rejected.**

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| Modern Slavery Act 2015: Requirements under Modern Slavery Act 2015 | |
| 1. Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act")? | YES/NO |
| 1. If you have answered yes to the above question are you compliant with the annual reporting requirements contained within Section 54 of the Act 2015? | YES  *(Please provide the relevant URL …)*  NO  *(Please provide an explanation)* |

**Please note that where you have answered “Yes” to question (a) above, a failure to answer “Yes” to question (b) above may result in your tender being rejected.**

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| Please provide the number of employees in your organisation |  |

**The above question is for information only**

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| Please self-certify that your organisation has a Health and Safety Policy that complies with current legislative requirements. | YES/NO |

**Please note that a failure to answer “Yes” to the above question may result in your tender being rejected.**

**IMPORTANT**

The Provider must declare any conflict of interest in relation to the Council’s requirement. The Council may exclude the Provider if there is a conflict of interest which cannot be effectively remedied. The concept of a conflict of interest includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.

Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Provider to inform the Council, detailing the conflict in a separate Appendix to their Quotation. Provided that it has been carried out in a transparent manner, routine pre-market engagement carried out by the Council should not represent a conflict of interest for the Supplier.

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| Signed: | Date: |
| Print Name: |  |
| Designation: | Company: |
| Tel No: | E-Mail Address: |