



Procurement Specific Questionnaire for CCHA-0290 Digital Transformation Partner Consultancy

FTS Reference Number: 013012-2025

Procurement Specific Questionnaire (PSQ)

Section 1: Contract Details

This PSQ relates to the procurement of a Digital Transformation Partner Consultancy (Contract) by Castles and Coasts Housing Association (the Authority) and should be read in conjunction with the other documents issued in connection with this procurement process.

You are reminded that the only document which you are requested to submit at this time is a response to this PSQ. A draft Invitation to Participate is provided at this stage for information only. **You must not submit an Initial Tender unless and until you have received notification that your PSQ submission has been shortlisted to proceed in the procurement process. Any Initial Tenders submitted at this stage will be disregarded entirely by the Authority.**

Section 2: Important Notice

This PSQ has been issued by the Authority in connection with a competitive procurement conducted via the competitive flexible procedure under the Procurement Act 2023 (the Act).

This PSQ is for use by suppliers who are interested in tendering for the Contract, their professional advisers and other parties essential to preparing responses to this PSQ and for no other purpose.

The contents of this PSQ, and that of any other documentation issued in connection with this tender process are provided on the basis that they remain the property of the Authority and must be treated as confidential. If you are unable or unwilling to comply with this requirement you are required to destroy all copies of those documents immediately and not to retain any electronic or paper copies.

This PSQ is made available in good faith. No warranty is given as to the accuracy or completeness of the information contained in it and any liability for any inaccuracy or incompleteness is therefore expressly disclaimed by the Authority and its advisers.

No information provided in this PSQ or in any communication between the Authority and any supplier in connection with this PSQ shall be relied upon as constituting a contract, agreement or representation that any contract shall be offered in accordance with this PSQ.

The Authority reserves the right, subject to the Act, to change without notice the basis of, or the procedures for this procurement or to terminate the procurement process at any time.

Where a supplier identifies information as “commercially sensitive” the Authority will endeavour to maintain confidentiality however suppliers should note that information provided in accordance with this PSQ will be disseminated within the Authority and potentially to external advisers for the purposes of evaluation.

The Authority reserves the right to cancel the procurement process at any time. The Authority shall not be liable for any costs resulting from cancellation of the procurement procedure or for any costs incurred by suppliers taking part in the tender process.

Direct or indirect canvassing of any employee or agent by any potential supplier concerning this PSQ or any attempt to procure information from any employee or agent concerning this PSQ may result in the disqualification of the supplier from consideration for this opportunity.

PSQs must be completed in the English language.

Suppliers are deemed fully to understand the process that the Authority is required to follow under the Procurement Act 2023 and related legislation.

Section 3: Introduction for Suppliers

Public procurement is governed by legislation to ensure that procurement delivers value for money, competition, transparency and integrity.

The Procurement Specific Questionnaire (PSQ) contains guidance to ensure that suppliers share the right information when participating in a procurement process. This is separate from the formal Tender submission. The PSQ consists of three parts:

Part 1 – Confirmation of core supplier information: suppliers participating in procurements are required to be registered on the Central Digital Platform (CDP) accessible at www.gov.uk/find-tender. Suppliers can submit their core supplier information and, where a procurement opportunity arises, share this information with the contracting authority. 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 with the Authority using downloadable PDFs from the CDP. Part 1 provides confirmation that the supplier has taken this step.

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 persons¹) exclusions information on the CDP and share this with the Authority. 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.

As part of the procurement, a supplier will need to also share additional exclusions information for any suppliers that they are relying upon to meet the procurement’s conditions of participation. These could either be consortium members or key subcontractors (but excludes any guarantors). These suppliers are “associated persons” and their exclusions information must be shared with the contracting authority. We recommend that this is done by ensuring that associated persons register and submit their information on the CDP and share this with the Authority (like the prime/main supplier).

¹ 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 a supplier or a connected person of the supplier.

In addition to the subcontractors who are being relied upon to meet the conditions of participation (who are associated persons), suppliers need to share an exhaustive list of all their intended subcontractors which will be checked against the debarment list.

If a subcontractor 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 subcontractor 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.

Part 3 – Conditions of participation: contracting authorities 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.

The PSQ sets out how the information provided by suppliers in response to each question will be assessed.

Suppliers should note that contracting authorities have legislative duties to publish certain information which relates 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 suppliers.

Where a supplier is unsure or requires any clarification, they should check with the contracting authority.

Section 4: Clarifications and Questions about this PSQ

Suppliers should respond via the Authority's nominated eSender Portal (Proactis ProContract) with clarification requests according to the timetable advertised on the Authority's Invitation to Participate in a Tender Process - Section 4: Procurement Timetable. Messages should contain 'Request for Clarification' in the subject header. The Authority will collate and anonymise queries, prepare responses and circulate these to all suppliers by the date identified in the timetable.

Suppliers should inform the Authority of relevant instructions regarding commercially sensitive information by sending a message via the Authority's nominated eSender Portal (Proactis ProContract) with 'Commercially Sensitive Information' in the subject header.

Section 5: Conditions of Participation

The objective of this PSQ is to assess the responses to the PSQ and select suppliers to proceed to the next stage of the procurement. It is a minimum requirement that all suppliers achieve a "pass" for all of Parts 1 and 2 of this PSQ. The Authority intends to shortlist five suppliers whose responses score highest in Part 3 of this PSQ following evaluation of submissions. In the event of a tie in supplier scores that results in more than five suppliers qualifying for progression to the next stage, the Authority will allow all suppliers filling the top five ranked positions to progress to the next stage (even if in practice this results in more than five suppliers progressing).

The Conditions of Participation, against which suppliers' responses to this PSQ will be evaluated, are as follows:

| Section of PSQ | Requirements |
|---|---|
| Preliminary Questions | <ul style="list-style-type: none"> This section must be fully completed |
| Part 1 – Core Supplier Information from CDP | <ul style="list-style-type: none"> All suppliers must complete this section with the requested information. If any of requested information is not provided (including a pdf share file), the Authority reserves the right to disqualify the supplier from this process . |
| Part 2A – Associated Persons | <ul style="list-style-type: none"> No Associated Person should be an excluded supplier in order for the supplier to pass this section The Authority will use its discretion under the Act in relation to any Associated Person which is an excludable supplier Where any associated person does not pass the requirements of this section, the Authority will give the supplier an opportunity to replace the proposed Associated Person in accordance with the requirements of the Act. Where the supplier is unable to replace the Associated Person in question with an acceptable alternative, the Supplier will be disqualified from the process. |
| Part 2B – Intended Subcontractors | <ul style="list-style-type: none"> Where any intended subcontractor is on the debarment list the Authority will give the supplier an opportunity to replace the intended subcontractor in accordance with the requirements of the Act. Where the supplier is unable to replace the intended subcontractor in question with an acceptable alternative, the supplier will be disqualified from the process. |
| Part 3 – Specific Questions relating to Conditions of Participation | The questions in part 3 are scored depending on the question type. Section 7 |

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| | sets out the scoring mechanism for each question and full criteria. |
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Section 6: How to respond to this PSQ

Suppliers must answer all questions with a direct and explicit answer which is as accurate and concise as possible in the same order and format as the questions are presented. Information should be relatively comprehensive as this will be the single source of information on which responses are evaluated, and expectations on meeting word counts observed. Referring to a document in an answer to a question is not acceptable, unless specified that a document is required. Where a question is not relevant to the supplier's organisation, or cannot be answered fully, this should be indicated, with an explanation where appropriate.

Suppliers are asked to provide a single point of contact within their organisation for their response to the PSQ. The Authority will not be responsible for contacting the supplier through any route other than the nominated contact. The supplier must therefore undertake to notify any changes relating to the contact promptly.

The information supplied will be checked for completeness and compliance before responses are evaluated. Please ensure that you complete the questionnaire as requested. The Authority reserves the right to reject PSQ responses which are not submitted in accordance with the instructions provided.

Suppliers are advised neither to make any assumptions about their past or current supplier relationships with the Authority nor to assume that such prior business relationships will be taken into account in the evaluation procedure.

Section 7: Evaluation of responses to the PSQ

Questions will be scored as follows

Table 1A

| Section | Question | Scoring Type | Sub Weighting Allocation |
|-----------------------|----------|------------------|--------------------------|
| Preliminary Questions | 1-3 | Information only | Information only |
| Preliminary Questions | 4 | Pass/ Fail | Pass/ Fail |

| | | | |
|---|-------|---|------------------|
| Part 1 – confirmation of core supplier information | 5 | Pass/ Fail (Fail will only occur if tenderer fails to provide the information) | Pass/ Fail |
| Part 2- Additional exclusions information | 6-8 | Information only | Information only |
| Part 2- Additional exclusions information | 9 | Pass/Fail | Pass/Fail |
| Part 2- Additional exclusions information | 10 | Information only | Information only |
| Part 2- Additional exclusions information | 11 | Pass/Fail | Pass/Fail |
| Part 3 – questions relating to conditions of participation | 12-16 | Pass/ Fail | Pass/ Fail |
| Part 3 – questions relating to conditions of participation | 17 | Information only | Information only |
| Part 3 – questions relating to conditions of participation | 18-26 | Pass/ Fail | Pass/ Fail |
| Part 3 – questions relating to conditions of participation Social Value | 27 | Scored in line with Table 1B | 10% |
| Part 3 – questions relating to conditions of participation Technical Solutions | 28 | Scored in line with Table 1B | 10% |
| Part 3 – Technical Capability Previous Contract Experience | 29 | Scored in line with Table 1B | 50% |

| | | | |
|-------------------------------|----|------------------------------|------|
| Part 3 – Technical Capability | 30 | Scored in line with Table 1B | 30% |
| Skills and Qualifications | | | |
| | | | 100% |

The PSQ will be subject to a two-stage evaluation process which is detailed below.

The evaluation methodology followed by the Authority will be as follows

- The Authority will first assess the questions outlined in Table 1A which are classed as 'Pass/Fail' with the exception of the 'financial capacity' questions, any PSQ response deemed as a fail will result in the PSQ being disqualified and no further assessment will take place
- Secondly, the Authority will assess the financial capacity of the supplier, if the financial capacity questions result in a fail then the PSQ will be disqualified and no further assessment will take place
- Finally, the Authority will assess the technical capability of the supplier, inviting the suppliers in the top 5 positions (when ranked) to the tender stage of the process

For any Pass/ Fail questions the supplier must provide a response which satisfies the requirements of the question and where relevant demonstrates an acceptable approach in accordance with good industry practice relative to the size and nature of this contract

Part One – Pass/Fail Questions

If a supplier fails on any of the 'Pass/Fail' questions as set out in Table 1A the Authority will disqualify the supplier at this stage and will not proceed to evaluate the Selection Criteria in Part 3. The Authority reserves the right to seek clarification from the Tenderer if any answer to the 'Pass/Fail' questions is not clear.

Suppliers must be aware that if they fail any of the 'Pass/Fail' questions then their bid will be rejected, and they will not proceed further in the tender process.

Part Two – Selection Criteria

The Authority will review the selection criteria and mark suppliers against the criteria set out below in Table 1B. The Authority will then invite the suppliers in the top 5 ranked positions to submit a tender. In the event of a tie break the process set out in section 5 will be followed.

The following table provides the scoring rationale which will be utilised for questions 27-29

Table 1B

| Score | Remark | Evidence |
|-------|--------|----------|
|-------|--------|----------|

| | | |
|----------|-----------------------|--|
| 5 | Excellent | Meets most or all the requirements of the question completely– an excellent response to the highest standard and relevance, supported by relevant detail and examples, that provides the evaluators with an excellent level of confidence that the supplier will be able to fulfil the requirements of the contract in full |
| 4 | Good | Meets most or all of the requirements of the question completely – a comprehensive response in terms of information, understanding and relevance to the question which provides the evaluators with good confidence that the supplier will be able to fulfil the requirements of the contract. |
| 3 | Satisfactory | Meets many of the requirements of the question to a good degree – a satisfactory response with an acceptable level of information, understanding and relevance to the question which satisfies the evaluators that the supplier will be able to fulfil many of the requirements of the contract, and although there may be weaknesses there are no significant concerns. |
| 2 | Weak | Meets many of the requirements of the question to a degree but information is limited in places and in some areas only a limited understanding has been demonstrated. The response provides evaluators with some concerns as to the supplier's ability to fulfil the requirements of the contract. |
| 1 | Unsatisfactory | Fails to meet the requirements of the question in many aspects (although it might meet some) – a response that demonstrates minimal understanding and relevance to the question and/or provides the evaluators with significant concerns as to whether the supplier will be able to fulfil many of the requirements of the contract. |
| 0 | Failed | Does not meet the question requirements at all—no response provided, or a wholly inadequate answer showing no relevance to the question |

Section 8: The PSQ

Suppliers should complete this section accurately and to the best of their knowledge, information and belief, having made prudent investigations of any other persons and entities included in the responses, and sign and date where indicated.

| Preliminary Questions | |
|------------------------------|---|
| 1. | What is your name? (supplier name) |
| | [Insert name] |
| 2. | What is your central digital platform unique identifier? <i>You must be registered on the central digital platform (CDP).</i> |
| | [Insert unique identifier] |
| 3. | Please confirm if you are bidding as a single supplier (with or without subcontractors) 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: <ul style="list-style-type: none"> 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, subcontractor) |
| | [Insert information] |
| 4. | Are you on the debarment list? The debarment list can be found here: Procurement Review Unit - GOV.UK Debarment List |
| | [Insert Yes or No] [If yes, insert details] |

| Part 1 – confirmation of core supplier information | |
|---|---|
| 5. | You must submit up to date core supplier information on the CDP and share this information with us via the CDP (with a PDF download). 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 name of supplier, insert file name and upload pdf file alongside PSQ]

Part 2 – additional exclusions information

Part 2A – associated persons

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

[The conditions of participation are outlined in Part 3]

If so please complete **Q7, Q8 & Q9** (otherwise **Q7, Q8 & Q9** are not applicable).

[Insert Yes or No]

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

[Insert name of supplier and brief description]

- 8.** For each associated person, you must confirm they are registered on the CDP and have shared with us their information (a 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

For avoidance of doubt, suppliers who refuse to replace an excluded associated person where requested to do so by the Authority, will have their PSQ application disregarded and will not continue to the next stage of evaluation.

[Insert name of supplier, insert file name and upload pdf file alongside PSQ]

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

The debarment list can be found here: [Procurement Review Unit - GOV.UK Debarment List](#)

For avoidance of doubt, suppliers who refuse to replace a debarred associated person, where requested to do so by the Authority, will have their PSQ application disregarded and will not continue to the next stage of evaluation.

[Insert Yes or No]

[If yes, insert details]

Part 2B – list of all intended subcontractors

10. Please provide:

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

If you are not intending to subcontract the performance of all or part of the contract, then this **question and Q11** are not applicable.

If a subcontractor 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 subcontractor 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]

11. Please confirm if any intended subcontractor is on the debarment list.

The debarment list can be found here [Procurement Review Unit - GOV.UK Debarment List](#)

For avoidance of doubt, suppliers who refuse to replace a debarred subcontractor, where requested to do so by the Authority, will have their PSQ application disregarded and will not continue to the next stage of evaluation.

[Insert Yes or No]

[If yes, insert subcontractor(s) name and provide details]

Part 3 – questions relating to conditions of participation

Financial capacity

12. Financial Capacity Conditions of Participation

CCHA wishes to conduct financial checks on the Tenderer through the use of Credit Safe. (Failure to provide consent will result in your application being rejected.)

For Tenderers to successfully Pass this question they must have a Credit Safe overall score equal to, or higher than the designated threshold of 50.

Does your organisation give CCHA consent to use Credit Safe to conduct financial checks when necessary?

[Insert Yes or No]

13. Please provide your last 2 years audited accounts. If accounts have not been audited within the last 2 years then please provide a copy of your latest management accounts.

- The minimum annual turnover has been set at **five** times the annual contract value which for the purposes of the assessment has been set at £200,000.
- A review of the last two years accounts should demonstrate;
 - profitability in both years as the minimum standard on the 'net profit and loss'.
 - Liquidity ratio (current assets/ current liabilities) of ≥ 1.2

[insert file name and upload pdf file alongside PSQ]

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

If so, please provide their name and the last 2 years audited accounts

[Insert Yes or No]

[If yes, insert name of supplier, insert file name and upload pdf file alongside PSQ]

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* = £10m
- b. Public Liability Insurance = £10m

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| <p>c. Professional Indemnity Insurance = £2m</p> <p>*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</p> |
| <p>[Insert Yes or No]</p> <p>[Insert details of your insurances already in place]</p> <p>[Insert details of your insurances which would be obtained following contract award (including information on how you will obtain this insurance)]</p> |
| Legal capacity |
| 16. Legal Capacity Conditions of Participation – Not Used |
| <p>[Supplier Confirmation]</p> <p>- Do Not Use</p> |
| <p>17. Are you a Small, Medium or Micro Enterprise (SME)?</p> <p>* The UK government definition of SMEs encompasses micro (less than 10 employees and an annual turnover under £2 million), small (less than 50 employees and an annual turnover under £10 million) and medium-sized (less than 250 employees and an annual turnover under £50 million) businesses</p> |
| [Insert Yes or No] |
| <p>18. 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.</p> <p>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:</p> <ol style="list-style-type: none"> 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 legitimise transfers of personal data outside the UK (if such transfers will take place) |

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|---|
| <p>e. to maintain records of personal data processing activities</p> <p>f. to regularly test, assess and evaluate the effectiveness of the above measures</p> |
| <p>[Insert Yes or No]</p> |
| <p>[Insert information]</p> |
| <p>19.Where you intend to subcontract a proportion of the contract, please demonstrate how you have previously maintained healthy supply chains with your subcontractor(s) (which may be the intended subcontractor(s) for this procurement, or any others use previously). The description should include the procedures you use to ensure performance of the contract.</p> |
| <p>[Insert information]</p> |
| <p>20. Health and Safety</p> <p>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).</p> |
| <p>[Insert information, word limit 300 words]</p> |
| <p>21.Does your organisation hold ISO9001 and ISO27001 certifications or relevant experience and standards?</p> |
| <p>[Insert Yes or No]</p> <p>[if Yes, insert or details of relevant experience insert file name and upload pdf file alongside PSQ]</p> |
| <p>22.Does your organisation hold Cyber Essentials Plus or equivalent IT cyber security certifications?</p> |
| <p>[Insert Yes or No]</p> <p>[if Yes, name the certifications, date(s) awarded or renewed, and duration for which the certification(s) are valid]</p> |
| <p>23.Does your organisation host both their data and systems in the UK or the EU?</p> <p>The Authority reserves the right to disqualify the PSQ application if the data is not held in a location which meets its data and cyber security requirements.</p> |
| <p>[Insert Yes or No, if no, specify what data is hosted in which location(s)]</p> |
| <p>24. Does your organisation have capacity to participate in the tender process, meeting the outlined dates for tender submission and interviews/ assessments?</p> |

[Insert Yes or No]

25. Does your organisation have capacity to commence work post contract award immediately? If not immediately, what mobilisation period will be required?

[Insert Yes or No; insert information]

26. Where applicable please provide your Modern Slavery Statement (or equivalent statement/ document)

Relevant commercial organisations* are required to publish a Modern Slavery Statement and be compliant with the requirements contained within section 54 of the Modern Slavery Act 2015 and associated guidance. Their statement should include information relating to:

- a. the organisation's structure, its business and its supply chains
- b. its policies in relation to slavery and human trafficking
- c. its due diligence processes in relation to slavery and human trafficking in its business and supply chains
- d. the parts of its business and supply chains where there is a risk of slavery and human trafficking taking place, and the steps it has taken to assess and manage that risk
- e. its effectiveness in ensuring that slavery and human trafficking is not taking place in its business or supply chains, measured against such performance indicators as it considers appropriate
- f. the training and capacity building about slavery and human trafficking available to its staff

Or

You are not 'a relevant commercial organisation' but can provide an equivalent statement or document which demonstrates information relating to a to f above.

Or

You do not have a Modern Slavery Statement and will commit to the Authority's policy and principles regarding eliminating Modern Slavery in your operations and supply chain.

Do you have a Modern Slavery Statement or equivalent?

[Insert Yes or No]

[If yes, insert file name and upload pdf file alongside PSQ]

If no, do you agree to comply with the Authority's policy and principles regarding eliminating Modern Slavery in your operations and supply chain?

[Insert Yes or No]

27. Please provide examples of where your organisation has delivered social value activity in the past 12 months?

The Supplier must demonstrate experience of adding relevant and beneficial social value in similar contracts - including details of what social value was delivered, how this was selected, and the impact and changes brought about.

[insert information, word limit 500 words]

28. Please provide information on the breadth of technical solutions you have recommended and/or implemented in a strategic partner capacity and the key drivers that lead you to making those recommendations?

[insert information, word limit 500 words]

Technical ability

29. Relevant experience and contract examples

Please provide details of up to three contracts to demonstrate compliance with the technical ability conditions of participation, as set out in the relevant notice or procurement documents. These may include examples of grant-funded work.

- Examples must be from the past **five years**.
- For each example, include:
 - **Client name and contract title**
 - **Brief description** of the work delivered, including scale and complexity
 - **Contract value and duration**
 - **Your organisation's specific role** (e.g. lead contractor, subcontractor, consortium partner)
 - **Outcomes achieved**, including any measurable benefits
 - A **named contact** (including email address) who can verify the accuracy of the information provided, should we, the Authority, choose to do so.

If bidding as a consortium or relying on an associated person to meet the technical requirements:

- You must provide relevant examples of similar work delivered by the associated party.
- If this is not possible (e.g. newly formed consortium or special purpose vehicle), provide **three examples shared across the principal members, subcontractors, or consortium partners**. Three examples are not required from each member individually.

Examples should demonstrate (but are not limited to):

- Successful delivery of programmes of **similar scale, scope, and complexity**
- Ability to manage **multiple stakeholders and programme/project risks**

- **Compliance with quality standards** and/or regulatory requirements
- Evidence of **innovation, cost savings**, or added value
- **Depth and breadth of experience** across your organisation or delivery team utilised to deliver the given example

If you cannot provide required examples of previous contracts that are relevant to the requirement, in no more than 500 words please provide an explanation (see box below the examples sheets) 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.

| | |
|--|--|
| Example 1 | |
| Name of Client organisation | |
| Position and name of point of contact in Client organisation | |
| Email address of Client point of contact | |
| Contract Title | |
| Contract start date | |
| Contract completion date | |
| Estimated Contract Value | |
| Your organisation's specific role within the contract | |
| Outcomes achieved, including any measurable benefits | |
| Description of work delivered (Maximum 500 words) | |
| | |

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| Example 2 | |
| Name of Client organisation | |
| Position and name of point of contact in Client organisation | |
| Email address of Client point of contact | |
| Contract Title | |
| Contract start date | |
| Contract completion date | |
| Estimated Contract Value | |
| Your organisation's specific role within the contract | |
| Outcomes achieved, including any measurable benefits | |
| Description of work delivered (Maximum 500 words) | |
| | |

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|--|--|
| Example 3 | |
| Name of Client organisation | |
| Position and name of point of contact in Client organisation | |
| Email address of Client point of contact | |
| Contract Title | |
| Contract start date | |
| Contract completion date | |
| Estimated Contract Value | |
| Your organisation's specific role within the contract | |
| Outcomes achieved, including any measurable benefits | |
| Description of work delivered (Maximum 500 words) | |
| | |

If unable to provide Examples above please insert alternative explanation in respect of how you meet conditions of participation here (maximum 500 words)

30. Please provide a summary (by completing the below table) of key persons that you anticipate will be assigned to the Contract, covering the following:

- Name, Job title, qualifications, location base and date they joined your organisation
- Experience and skills with reference to projects/ programmes they have supported within the past 5 years

Please add more lines to the table if needed

| Name | Job Title | Qualifications | Base Location | Date Joined | Experience & Skills (max 100 words per named individual) |
|------|-----------|----------------|---------------|-------------|--|
|------|-----------|----------------|---------------|-------------|--|

| | | | | | |
|------------|--------------------|--|-----------|------------|--|
| Jane Smith | Business Architect | BSc Business Information Systems, TOGAF Practitioner Certified | Newcastle | March 2019 | Jane has over 8 years' experience in business architecture across private, public and housing sectors. She led the redesign of customer-facing services for a major transformation programme, aligning business capabilities with strategic goals. Defining target application and data architectures. Skilled in stakeholder engagement, process mapping, and operating model design. |
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Confirmations

I confirm that:

- a. to the best of my knowledge the answers submitted, and information contained in this document are complete, accurate and not misleading
- b. upon request and without delay I will provide any additional information requested of us
- c. 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
- d. 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 | |
| Single Point of contact name | |
| Role | |
| Phone number | |
| Email | |