**Stage 2**

**Invitation to Tender**

**Emmaus Catholic Academy Trust & Romero Catholic Academy Trust**

**Tender for the supply of managed HR, Payroll and Pension systems**

**MultiQuote Reference CA15627**

Date & Time for Return of Tenders: **5pm, 12 September 2025**

Anticipated Initial Start Date: **1 April 2026**

Anticipated Contract Extension Period: **2** **x 12 months**

A Competitive Flexible Procedure

comprising a two-stage restricted tender process

conducted in accordance with the Procurement Act 2023

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**Section 1: Introduction to the Trusts and the proposed contract – Emmaus Catholic Academy Trust**

*‘Emmaus CAT is one of three Catholic Academy Trusts within the Diocese of Salford. The footprint of Emmaus CAT serves the Roman Catholic schools within the areas of Manchester, Oldham, Stockport, Tameside and Trafford.*

*Our aim is simple; to ensure we have great schools – strong in faith – service society.*

*We are creating a healthy Catholic organisation. We are here to serve the children and young people in Catholic schools, communities, parishes, and families across the Greater Manchester area.*

*Our schools are aligned in our mission and share the philosophy of working collegially to develop meaningful relationships between schools, parishes, families, communities, and the Diocese of Salford by continually supporting school improvement faith formation and serving society’.*

Emmaus CAT Enrolment**:**

Enrolment is currently 1,301 staff (from 22 schools), supported by 1 member of staff in the central finance team along with helpdesk support from Edupay (see below). *Note that this data is correct as at 03.04.25 with new schools due to convert in summer term and in Autumn 2025.*

Emmaus CAT Payroll Processing:

Payroll processing is currently supported by Edupay software across 22 schools, including outsourced services from Edupay for mandatory payments and monthly reporting to HMRC, Teachers Pension Scheme and Greater Manchester Pension Fund, who administer the Local Government Pension Scheme across the 5 local authorities that Emmaus covers.

Edupay are also responsible for the monthly BACS file to pay employees and have direct debit functionality over the Emmaus bank account to cover payments.

Edupay is a self-service platform which is administered by School Business Managers across the CAT for standard monthly changes such as new starters, leavers, contract changes, overtime and maternity/paternity, with central support from a part-time Trust Finance Manager and helpdesk support from Edupay where required for any non-standard payments.

Training for new schools on the software is currently provided by the Trust Finance Manager, with set-up of new schools completed by Edupay with testing and parallel runs from the finance team.

|  |  |
| --- | --- |
| Payroll & HR Information | Emmaus CAT |
| Number of payrolls processed | One monthly payroll |
| Pay dates | 15 each month for all staff or closest working day before 15 – 2 weeks in arrears, 2 weeks in advance |
| Number of PAYE references | One PAYE reference |
| Number of bank accounts | Only main Trust bank account is used |
| Number of P11Ds | Pay mileage at HMRC agreed rates and no staff above threshold, therefore none issued last year |
| How are payroll reports currently issued by the managed service providers | Online platform where all reports and monthly data can be accessed. Payroll provider submits i-Connect and MCR submissions to pension schemes |

Emmaus CAT Pension Schemes

As of April 2025, there are 3 pension schemes in total:

* Teachers’ Pension Scheme – 534 members
* Greater Manchester Pension Fund - 893 members
	+ Currently 5 separate pools and employers contribution rates
		- Manchester (pooled with LA)
		- Oldham (pooled with LA)
		- Tameside (pooled with LA)
		- Trafford Schools Emmaus Pool
		- Stockport Schools Emmaus Pool

Emmaus CAT HR System:

The HR platform used is SAM People, specifically for staff absence management. Schools have direct access to this system to record, track and manage staff absences. It allows schools to monitor absences and highlights when support interventions are required in line with the Trust’s Sickness absence policy. The system offers a case reporting facility, and standard letters and templates can be stored and utilised by school leadership teams. The Trust have access to absence reports to monitor and track absence at CAT level. SAM People offer a self-serve portal which staff can access to request leave and update employee information. Policy documents can also be stored and shared on SAM People. Training for schools on the system is currently deployed by the Trust HR provider on request.

Emmaus HR Schemes:

* 2 x sickness schemes (green book & burgundy book)
* 5 x holiday schemes (1 for each LA) but they differ based on length of service
* 7 x maternity schemes at present, but can change as new schools join the Trust
* 2 x paternity schemes (green book & burgundy book)

Emmaus CAT Recruitment:

Emmaus CAT don’t currently have an online applicant tracking system in place. Jobs are posted/uploaded to the Trust’s TES account. Other platforms used for posting jobs include Greater Jobs, The Trust’s own website, the Diocesan website and the relevant school’s website. Applicants are required to complete the required application form and associated documents and return these to a key contact, either at the school or our central team.

Emmaus CAT Staff Numbers Per School

12 more schools are due to join the Trust before the contract goes live, your response should include pricing for adding new schools to the system throughout the life of the contract:





Emmaus CAT Systems in Use:

SIMS and Arbor are used as the Management Information System (MIS), all schools will migrate to Arbor from September 2025, however providers will need to have the ability to integrate with SIMS and Bromcom to ensure a smooth onboarding process for converting school.

IRIS Financials (PS Financials) is the finance system used.

**Introduction to the Trusts and the proposed contract – Romero Catholic Academy Trust**

**Romero CAT are one of three multi academy trusts established by the Catholic Diocese of Salford to serve the schools in the north of the diocese. Our geographical area includes diocesan schools within the local authorities of Lancashire, Blackburn with Darwen and Calderdale.**

*We are a rapidly growing academy trust. Currently we are a family of five primary and two secondary schools. The Trust includes some schools with directive academy orders, but most are voluntary convertors who have taken the decision to become an academy to work more closely within our community of schools to achieve the best outcomes for our pupils and to support each other.*

*The purpose of the Trust is simple: We have come together so that our schools can work together to improve the outcomes, experiences and future life chances of our children and young people’.*

Romero CAT Enrolment**:**

Enrolment is currently 854 staff (from 7 schools), supported by 4 members of HR staff.

Romero CAT Payroll Processing

Payroll processing is currently supported by an in-house team and the current payroll provider; however, this procurement will be for a software solution only with more capacity being created at Trust level. The Trust currently utilises Oracle Fusion via Lancashire County Council for their HR, Payroll and Pension software.

The aim of this pre-market engagement process is to understand the functionality and support offer from software and suppliers in the marketplace to inform specification development.

|  |  |
| --- | --- |
| Payroll & HR Information | Romero CAT |
| Number of payrolls processed | One monthly payroll |
| Pay dates | Last working day of the month |
| Number of PAYE references | One PAYE reference |
| Number of bank accounts | Only main Trust bank account is used |
| Number of P11Ds | Pay mileage at HMRC agreed rates and no staff above threshold, therefore none issued last year |
| How are payroll reports currently issued by the managed service providers | Issued by email in 3 stages each month, XL spreadsheets and PDF documents for payslips. Payroll provider submits MCR submissions and LGPS submissions. Payroll provider also makes payments to HMRC and 3rd parties on behalf of the Trust. |

Romero CAT HR System

There is currently no HR System in place.

Romero HR Schemes:

* 2 x sickness schemes (teachers and support staff)
* 2 x holiday schemes (teachers and support staff)
* 2 x maternity schemes (teachers and support staff)
* 2 x paternity schemes (green book & burgundy book)

Romero CAT Recruitment

There is currently no online applicant tracking system in place. Jobs are posted/uploaded to the Trust’s TES account. Other platforms used for posting jobs include Greater Jobs, The Trust’s own website, the Diocesan website and the relevant school’s website. Applicants are required to complete the required application form and associated documents and return these to a key contact, either at the school or the central team.

Romero CAT Pension Schemes

As of April 2025, there are 3 pension schemes in total:

* Teachers’ Pension Scheme – 342 members
* Lancashire County Pension Fund (16 separate employer contribution rates) - 446 members
* West Yorkshire Pension Fund – 15 members

Romero CAT Staff Numbers Per School

3 other schools will be joining the Trust before the contract goes live:

* St John Fisher & Thomas More RC High School
* St Charles Primary School Rishton
* St Michael and St John’s Primary School



Romero CAT Systems in Use:

SIMS is used as the Management Information System (MIS) but there is an ambition to move to a new MIS in the next 18-24 months.

IRIS Financials (PS Financials) is the finance system used.

**Tenderers must ensure they give a full and complete response as to how they will provide the required services.**

The supplier should work to a 1 April 2026 implementation date for all systems/all lots; the exact ‘go live’ date for each system will be discussed with the successful supplier. All systems will have the same co-terminus date.

It is important that the tenderer provide an honest response to each of the items listed within the System Statement of Requirements table along with comments on how the system can undertake each item.

The score may be adjusted to 0 (zero) if the comments to specific items are not comprehensive in detail and the Trust cannot fully understand how the software meets the functionality.

Tenderers are asked to limit the number of separate appendices within the submission to a minimum. As this is a complicated evaluation process, tenderers’ responses should be as clear as possible to ensure details are not missed due to information not being clearly referenced or presented.

If the Provider is unable to comply with the specification of any item or aspect, they must clearly state the way their offer deviates from the specification or requirement.

The Trusts wish to use the supplier contract. Please ensure that this is submitted with your tender response for review by the Trusts as part of the evaluation process.

**Scope of Works**

Emmaus CAT and Romero CAT have a requirement to appoint a supplier/ suppliers for the supply, implementation and maintenance of Integrated HR, Payroll, Pension, LMS and Recruitment Systems.

Emmaus CAT and Romero CAT are looking to work with a pro-active supplier(s) who will work with the Trust’s to maximise the return on investment. The chosen supplier would be required to undertake the responsibility for the supply and installation of the software, provide support with the transfer of data and undertake training to key personnel across Emmaus CAT and Romero CAT. Upon going ‘live’ the chosen supplier will provide support and maintain the software for the duration of the contract.

It is a requirement that implementation work for the new systems will go live on **1 April 2026 or earlier in agreement with the successful tenderer and the Trust**, in readiness for data migration, parallel runs, system testing, etc.

Romero CAT’s current payroll system has 37 Core users and up to 850 concurrent users. The current system has 23 core users. In addition, there are up to 1,500 concurrent users across the organisation that will use the self-service software and to update their personal details which will include changes to their postal address and view payslips request annual leave. These changes will be made using a self-service module.

Emmaus CAT’s current self-service payroll platform has 34 core users and up to 2,500 concurrent users across the organisation; this will rise to 60 core users and 5,000 concurrent users over the next 5 years in line with rapid growth plans. Core users can currently update contract changes, allowances, maternity and absence whilst self-service users can update expense claims and personal details and view payslip data.

It is therefore key that systems and support are enabled to deal with set-up and parallel running of payroll for new schools with flexible timeframes.

As both Trusts are expanding, the new system must be able to quickly and efficiently manage addition of schools to the Trust.

**The Key Objectives For All Systems**

It is essential that the Integrated HR & Payroll System solution supports both the HR & Payroll objectives of each Trust. These are listed below. Suppliers will have to demonstrate their ability to meet the Integrated HR & Payroll System objectives within the Integrated HR & Payroll System Statement of Requirements table. These will be scored on a pass/fail basis. Should the Trust score one or more of the HR and/or Payroll objectives as a fail, the evaluation of the tender will stop, and the supplier will be considered to be incapable of further progress in the competition.

The general objectives for the systems within this tender are anticipated to be as follows:

* Cloud Based System - Software as a Service Model (SaaS), with everything included in the same price, system updates/upgrades including new full releases, security patching, licensing, training etc.
* Azure AD / Office 365 Integration
	+ Single Sign on for Staff Trust O365 Trust accounts
	+ Starter Workflows and auto account creation within Azure AD / Active Directory
	+ Leaver Workflow and auto account disabled / deletion Azure AD / Active Directory following a cooling period
	+ Change of Role processes
	+ Change of details, such as name, job role, line manager reports, etc to be updated through to Azure AD / Active Directory.
* Cyber Security - Emmaus CAT and Romero CAT are Cyber Essentials accredited, solution must demonstrate its compliance with the Cyber Essentials framework and future changes to questionnaire sets (such as Evandine)
* API’s and Integrations with other Trust systems. It is essential that the HR & Payroll Bureau System integrates effectively with all MIS and finance systems in operation.
* Accurate and reliable HR & Payroll data processing and reporting, including payroll journal;
* A ‘user friendly’ system for all the employees of the Trusts ensuring usability and accessibility is embedded in the development of the software;
* Modular based to include, but not limited to, personal details, training, recruitment, employee details, leavers, sickness, pay deductions, reporting and statutory returns and self-service is highly desirable;
* Flexible structure, allowing changes in organisational structures to be made easily, including options for parent/subsidiary and multi company structures. NB potential for supporting shared service offer for other organisations;
* Facility to analyse, and report, at all levels, including individual, departmental, school and Trust level;
* “Workflow” flexibilities e.g. absence management procedures
* “Self-service” transactional processes fully automated e.g. changes to personnel details, address, expenses etc.;
* Compatibility with Microsoft Office as standard to enable the uploading of data, and download and manipulate/model information in excel format;
* Fully compatible and automated interface with other Member systems, which include:
* BACS;
* Financial Management Systems (IRIS & IMP);
* Management Information Services / Pupil Records;
* The facility to interface with additional systems would be advantageous to the Trust.
* Reporting, in a format understandable to users;
* Simple to use integrated report writer capable of enabling users to produce and store high quality and visually presentable reports in a professional standard/layout;
* The ability to store scanned images of prime documents such as qualification certificates, ID, **DBS** documentation etc.;
* The security maintenance of the system must satisfy requirements re. segregation of duties, however there is a need to maintain the flexibility required in a large complex organisation and not be overly burdensome in its administration;
* A facility to update/upgrade, allowing the Trust to ‘’future-proof” the system.

**Section 2: Tendering instructions and information**

**Note:**

**Only the 6 highest scoring suppliers for each lot at Stage 1 (Procurement Specific Questionnaire) will be invited to submit a tender response to this Stage 2 Invitation to Tender**.

**Do not complete and return this Stage 2 Invitation to Tender unless specifically invited to do so, following evaluation of the Stage 1 Procurement Specific Questionnaire.**

**Introduction**

1. The enclosed invitation to tender provides information for consideration with respect to Emmaus CAT and Romero CAT (“the Trusts”) contract for the supply of managed HR, Payroll and Pension Systems.
2. Tenderers are required to answer all applicable questions and include all documentation requested. The tender must be completed in English.
3. All information received in connection with this tender application will be treated in the strictest confidence.
4. Tenders must be submitted in accordance with these tendering instructions. Non-compliant tenders may be rejected by the Trusts, whose decision in this matter shall be final.
5. If the contract is split into individual lots, these instructions will apply to each lot, individually.
6. These tendering instructions relate to the supplies, services or works advertised in the UK Find a Tender Service which notice contains the MultiQuote tender reference stated on the front cover of this Stage 2 tender document.

**Tender Timescale**

1. An indicative timetable for the tender process and award of contract is given in the table below:

| **Activity** | **Date** |
| --- | --- |
| Issue Stage 1 Procurement Specific Questionnaire (PSQ) | 11 July 2025 |
| Final date for submission of Stage 1 PSQ | 10am, 5 August 2025 |
| Notification of Stage 1 PSQ evaluation outcome | 14 August 2025 |
| Mandatory Dialogue Stage | 14 – 15 August 2025 |
| Issue of Stage 2 Invitation to Tender to successful suppliers | 16 August 2025 |
| Final date for Stage 2 Invitation to Tender submissions | 5pm, 12 September 2025 |
| Online/virtual presentations/demonstrations \* | 21 October 2025 |
| Issue of award decision & assessment summaries  | 17 December 2025 |
| Standstill period | 18 – 31 December 2025 |
| Mobilisation period (including contract signing) | 5 January – 31 March 2026 |
| Contract commencement & systems to go ‘live’ | 1 April 2026 |

\* A maximum of the 3 highest scoring suppliers for each lot will be invited to the online presentation. In the event of the scores being close (less than 1%) the Trusts reserve the right to amend the number of suppliers invited to present.

**Site Visit**

1. A site visit is not required for this tender.

**Tender Return & Validity**

1. Tenders must be submitted via the advertised tender opportunity on MultiQuote, the CPC eProcurement portal (<https://suppliers.multiquote.com/Page/Login.aspx>) not later than **5pm, 12 September 2025** which shall be the date fixed for submission of tenders. Late responses will not be considered.
2. Tenders must be returned via the submission facility for the advertised tender on MultiQuote, the CPC eProcurement portal. No other form of tender submission will be accepted.
3. If you require assistance with making your submission, contact the MultiQuote helpdesk on 020 3920 8054 or by email to support@elcom.com. **Allow sufficient time to upload your Tender Return Documents prior to the deadline**.
4. Tenders shall be submitted on the basis that the offers contained therein shall remain in force for a minimum of six months from the date fixed for the submission of tenders.
5. In submitting the tender, the tenderer shall undertake that, in the event of the tender being accepted by the Trusts, within fourteen days of being called upon to do so, the tenderer will execute a formal contract consisting of the terms and conditions of contract, this tender document and the successful tenderer’s tender submission. Until such date as the contract is executed this tender, together with the formal written acceptance of it by the Principal or Authorised Officer on behalf of the Trusts, will form a binding agreement between the Trusts and the tenderer.
6. Failure by the successful tenderer to execute a formal contract within the time specified above will render the contract voidable at the option of the Trusts at any time.
7. Tenders shall only be submitted on the basis that they are bona fide competitive tenders. The Trusts shall have the power to cancel the contract and to recover from the tenderer the amount of any loss arising from the cancellation if either the tenderer:
	1. shall have offered or given or agreed to give any officer or member of the Trusts staff any gift or consideration of any kind as an inducement or bribe to influence its decision in the tendering procedure. The word "tenderer" for these purposes shall be deemed to include any person employed by the tenderer, or person purporting to act on the tenderer’s behalf, whether the tenderer is aware of their acts or not; and/or
	2. shall have communicated to any other person than the Trusts the amount or approximate amount of the proposed tender other than in confidence to obtain quotations necessary for the preparation of the tender, or for insurance purposes; and/or
	3. shall have entered into any agreement or arrangement with any person or company as to the amount of any proposed tender or that the person or company shall refrain from tendering.
8. Apart from during arranged site visits, at no time should the tenderer, prior to submitting or following the tender submission, communicate with any person within the Trusts, regarding this procurement process. Failure to abide by this requirement may disqualify the tenderer’s proposal from being considered. All communication should be conducted via the tender messaging tool on MultiQuote, the eProcurement portal used by the Trusts (<https://suppliers.multiquote.com/Page/Login.aspx>).
9. Tenders must be based upon the terms, conditions and specification(s) and tender return documents set out in this tender document, otherwise they may be rejected based on unsuitability and non-compliance. Tenderers must complete the tender return documents listed in the table of contents and return them unaltered and in their native file formats. Tenderers shall not modify any of the tender return documents or reformat/rebrand them.
10. The Trusts will exclude tenderers at any time throughout the tender process should any grounds for exclusion pursuant to s.57 of the Procurement Act 2023, as amended from time to time, be found to apply.

**Acceptance of Tender**

1. The Trusts shall not be under any obligation to accept the lowest, or any tender.
2. The Trusts reserves the right to cancel the entire or parts of the tender, without such an action conferring any right to compensation on the tenderers.
3. The Trusts shall have no liability to settle any cost incurred by the tenderer resulting from this tendering procedure, or any re-tendering procedure.
4. Tenderers will be notified of the outcome of their tender submission in accordance with the tender timeline set out in this tender document. No tender will be deemed to have been accepted unless such acceptance has been notified to the tenderer in writing.

**Pricing**

1. Prices shall be submitted in accordance with TR2 Schedule of prices.
2. Unit rates and prices must be quoted in pounds’ sterling. Tenders should be submitted exclusive of Value Added Tax (VAT). Further instructions in respect of price submission are included in TR2 Schedule of prices.
3. If the Trusts suspects that there has been an error in pricing of the tender, the Trusts reserves the right to seek clarification as it considers necessary from that tenderer only.
4. If a tender appears to be abnormally low in relation to the requirements of the tender, the Trusts will request a clarification in writing and/or explanation concerning its elements. The Trusts reserves the right to exclude a tender if, after verification based on explanations and evidence received from the tenderer, it concludes that the tender is abnormally low.

**TUPE**

1. TUPE does not apply to this contract.

**Contract Commencement & Duration**

1. The successful tenderer(s) shall be prepared to commence the provision of the proposed supplies, services or works on 1 April 2026, being the commencement date referred to in the contract terms and conditions at Appendix B of this tender document. The duration of the contract will initially be for a period of 3 years with an option to extend the contract for an additional 2 x 12 months.

**Tender Queries**

1. Where tenderers have any queries about the tender documentation which may have a bearing on the offer to be made, these should be raised by contacting the CPC via the tender messaging tool on MultiQuote (<https://suppliers.multiquote.com/Page/Login.aspx>), the eProcurement portal used by the Trusts as soon as possible, and in any case **not later than calendar ten days** before the date fixed for submission of tenders for return of tenders. The CPC will circulate to all tenderers, a copy of all tender queries and replies provided. Tenderer anonymity will be preserved.
2. Where tenderers have any queries in respect of specific condition of the Contract terms and conditions, these should be raised by contacting the CPC via the tender messaging tool on MultiQuote (<https://suppliers.multiquote.com/Page/Login.aspx>), the eProcurement portal used by the Trusts as soon as possible, and in any case **not later than calendar ten days** before the date fixed for submission of tenders for return of tenders. Please ensure the specific condition(s) queries and any proposed amendment(s) are provided. These will be reviewed by the Trusts on a case-by-case basis, and, if accepted, revised terms and conditions will be issued to all tenderers. **Failure to otherwise accept the proposed Contract terms and conditions may result in the tender being rejected by the Trusts**.

**Tender Clarifications**

1. The Trusts may, during its evaluation of tender submissions, require clarification of parts of submissions from one, several, or all tenderers. Where practicable such clarifications will be conducted through the messaging tool on MultiQuote with the individual tenderers concerned and which will create an audit trail for that purpose.
2. Should the Trusts deem it necessary to hold a tender clarification meeting with one or more tenderers, such meetings will be arranged as soon as practicable and during the week identified in the tender timescale set out in this invitation to tender. Such meetings will be held only to clarify matters within tenderers’ submissions and will not be used to elicit additional information. Such meetings will not form part of the scored element of tender evaluation but will be to assist the Trusts with scoring of the tender submission(s) received.

**Tender Submission Checklist**

1. Tenderers shall ensure that they:
	1. Complete, sign and return TR1 Form of Tender
	2. Complete and return TR2 Schedule of Prices
	3. Complete and return TR3 Quality and Technical Questions
	4. Complete, sign and return TR4 Conflict of Interest Declaration
	5. Complete, sign and return TR5 Non-Collusion/Canvassing Declaration
	6. Complete, sign and return TR6 Declaration of Confidential Information
	7. Provide copy insurance documentation as follows, or provide a statement to confirm that such insurance will be in place upon entering into a contract should the tenderer’s offer be accepted:
		1. Employer’s Liability – £5 million
		2. Public Liability – £5 million
		3. Professional Indemnity – £5 million
2. Tenderers may submit additional supporting information, which must be clearly referenced to the element of the tender to which it refers. Tenderers shall not use this facility to increase any question word count, nor rely upon such additional information in isolation to address the requirements of the question to which the documents refer.

**Amendments to the Tender Documents**

1. The Trusts reserves the right to make changes of a minor drafting nature to the tender and contract documentation.
2. The Trusts reserves the right to make changes to the tender evaluation methodology stated Part 3. Tenderers will be informed of any changes prior to the date fixed for submission of tenders.

**Use of Tender Documents**

1. These tender documents shall be treated as private and confidential. Tenderers must not disclose that they have been invited to tender or release details of the tender documents, other than on an “in confidence” basis to those who have a legitimate need to know, or to those professional advisers whom the tenderer needs to consult for the purposes of preparing the tender.
2. Any information given to the tenderer by way of guide quantities and any plans, drawings or reports in the attached appendices are only given as a guide. The tenderer warrants that it has ascertained for itself the accuracy of the information. No claim against the Trusts shall be allowed whether in contract or in tort or under the Misrepresentation Act 1967 or otherwise on the ground of inaccuracy.
3. The copyright in these tender documents is vested in the CPC. They may not be reproduced, copied or stored in any medium without the prior written consent of the CPC other than for use strictly for the purpose of preparing a response to this invitation to tender.

**Freedom of Information & Duty to Disclose**

1. Tenderers shall specify with reasons if any information contained in their tender submissions is to be treated by the Trusts as confidential. This information can be provided by completion of TR6 Declaration of confidential information.
2. The Trusts will use reasonable endeavours to keep such information confidential but does not guarantee to do so if it is obliged to disclose such information pursuant to its duties under the Freedom of Information Act 2000 or the Procurement Act 2023.

**Equality and Diversity**

1. The successful tenderer(s) shall adhere to their own equality and diversity policies, copies of which shall be made available to the Trusts on request. As a minimum, these policies should reflect the requirements and values of the Trusts equality and diversity policies, copies of which will be supplied upon request.

**Safeguarding Young People and Adults**

1. The Trusts recognises that everyone has a right to protection from abuse and takes seriously its responsibility to protect and safeguard the welfare of children, young people, and vulnerable adults.
2. Where a tenderer’s personnel may encounter children, young people or vulnerable adults, or be expected to hold sensitive personal information in relation to them, the Trusts will require such Tenderer’s personnel to hold DBS clearance to the same level of DBS clearance, monitoring and verification as the Trusts would expect of its directly employed staff.
3. The Specification at Appendix A sets out whether such provision in respect of DBS clearance is required. If it is stated as being required, the tenderer will ensure that all costs incurred by the tenderer in respect of obtaining such DBS clearance for its relevant personnel is included in its tendered prices. No additional claims for costs associated with compliance with the requirements of DBS clearance will be accepted by the Trusts.

**Section 3: Award criteria and tender evaluation methodology**

1. The Contract will be awarded to the most advantageous tender(s) applying the award criteria and evaluation methodology detailed below.

**Integrated System Specifications (Non-Price)**

1. Scores for each question will be awarded as indicated in the separate Integrated System Specification document.
2. **Please note that the codes allocated by suppliers in response to the specifications may be amended to 0 as part of the evaluation should an insufficient response/evidence be provided to support the supplier code of response.**

**Price**

1. Scores will be awarded for price on the following basis:

The lowest Contract Price for each part submitted in accordance with the Schedule of Prices will be awarded the highest score and all other Tenderers will be awarded pro rata scores on the relative competitiveness of their Contract price compared to the lowest. For example:

(Contract Price – Lowest Contract Price / Lowest Contract Price \* 100) = X%. This percentage will be deducted from the total score available.

**Award Criteria & Weightings**

1. Tender Responses will be evaluated on the award criteria and weightings set out in the table below/overleaf:

|  |  |  |
| --- | --- | --- |
| **Award Criteria** | **Requirements** | **Sub-Criteria Weighting (%)** |
| Technical Quality Requirements (Non-Price) |
| Technical Quality Requirements (**60%**) | Compliance with specification | 25% |
| Demonstration | 35% |
| Price |
| Schedule of Prices (**40**%) | Schedule of Prices  | 100% |
| **Total (100%)** |