

Futura Learning Partnership
INVITATION TO TENDER FOR
Mechanical and Electrical PPM and Compliance

1. Introduction and Background

1.1 Futura Learning Partnership (Futura) are looking to appoint one organisation to provide Mechanical and Electrical Planned Preventative Maintenance (PPM) services across our 24 Futura Schools

1.2 Futura are looking to award this contract for an initial three year term, with a break clause after the first 12-month period. After three years, Futura reserve the right to extend the term for a further two periods of 12 months, based on satisfactory performance of the Organisation. The option to extend will be at the sole discretion of Futura.

1.3 The preferred contract start date is 1st September 2025

1.4 Only one contractor will be appointed to the contract

1.5 The schools are as follows

Bristol	<ul style="list-style-type: none"> • Meadows Primary School • Sir Bernard Lovell • Saltford CofE Primary School • Two Rivers CofE Primary School • Wellsway School, inclusive of IKB and WW Sports Centre • Chandag Primary School • St Johns CofE Primary School • Bridge Farm Primary School • Wansdyke Primary School • Four Acres Academy • Cheddar Grove Primary School
North Somerset	<ul style="list-style-type: none"> • All Saints Church of England Primary School • Chestnut Park Primary School • Clevedon School • Mary Elton Primary School • St Nicholas' Chantry C of E VC Primary School • Tickenham Church of England Primary School • Yeo Moor Primary School
Somerset	<ul style="list-style-type: none"> • Woolavington Village Primary School • Willowdown Primary • Westover Green Community School and Autism Centre • Puriton Primary School • Northgate Primary School

1.6 The issue of this ITT and Specification, along with supporting documentation, marks the commencement of the procurement process

2 Purpose and scope of this Invitation to Tender document

2.1 The purpose of this and supporting documents is to:

- 2.1.1 explain to Suppliers the timetable and process for the procurement;
- 2.1.2 set out the requirements and provide detail of the commercial, technical and legal provisions required by Futura and to elicit a response outlining Suppliers' proposals to meet those provisions;
- 2.1.3 explain the information required in response to this process and, through the detail included with the supporting documents, provide guidance for Suppliers' Responses;
- 2.1.4 explain the administrative arrangements for the receipt of Responses; and
- 2.1.5 set out the evaluation criteria that will be used to evaluate the Responses, and to select a Supplier to carry out the Services.

3 The procurement process

3.1 This procurement is being conducted under the Procurement Act 2023.

3.2 The key dates for the procurement procedure are set out in the table below (although Futura reserves the right to vary key dates on notice to all Suppliers).

Event	Estimated Date
Issue of Invitation to Tender	27 th March 2025
Final date for queries	Midday 22 nd April 2025
Final date for return of ITT	Midday 2 nd May 2025
Presentation date via Teams (provisional)	29 th May 2025
Inform Suppliers of outcome (anticipated)	27 th June 2025
Contract Award (anticipated)	10 th July 2025
Contracts to start	1 st September 2025

4 Responding to the ITT document

4.1 You must complete all relevant sections of the ITT in full. Additional information and supporting documentation should only be supplied where requested.

4.2 You must submit your Response to this ITT by **midday 2nd May 2025** (the "Deadline") in accordance with the provisions of this ITT. Futura reserves the right to extend the Deadline. Any extension granted will apply to all Suppliers. Futura reserves the right to reject any Responses received after the Deadline.

4.3 Tenders should be submitted using Futura's E Tender System, In-Tend. Submissions by any other means will not be considered unless written agreement has been sought from the Trust detailed in

this document. If you would like further information, guidance or support in using In-Tend please contact the In-Tend helpdesk by email at: Support@in-tend.co.uk

- 4.4 For each document you return using In-Tend you will be provided a confirmation to evidence that your document was lodged successfully.
- 4.5 Tenderers should ensure that the appropriate person is selected as the main point of contact on In-Tend. All correspondence will be sent electronically via In-Tend to this person.
- 4.6 On receipt of the Responses, Futura will perform an evaluation of Responses, with a view to selecting a single Supplier to carry out the proposed Services.
- 4.7 Futura reserves the right to request additional information from Tenderers if deemed necessary to enable the Trust to understand the tender submission for the purpose of the evaluation process. During the course of the evaluation process, Tenderers shall be required to make available key personnel who shall be authorised to respond to all matters relating to the Invitation to Tender, within 48 hours of receipt of a written query.
- 4.8 Futura may, in its absolute discretion, require that you attend a meeting to clarify any aspect of your response, or any other matter related to your submission.
- 4.9 The engagement of the successful Supplier is subject to the formal approval process of Futura. Until all necessary approvals are obtained, no contract will be entered into.

5 Instructions to Suppliers

- 5.1 You may submit, by no later than **midday 22nd April**, any queries that you have relating to this ITT. Please submit such queries using the clarification function on the In-tend portal, any queries should clearly reference any appropriate paragraph in the documentation and, to the extent possible, should be aggregated rather than sent individually. As far as is reasonably possible, Futura will respond to all reasonable requests for clarification of any aspect of this ITT and supporting documents, if made before the above deadline. Futura will endeavour to provide responses as soon as possible and in any case by no later than 5 working term time days after the query.
- 5.2 You must inform Futura in writing if there is any change in control, composition or membership of your organisation or your consortium members subsequent to your expression of interest in this procurement process. Futura reserves the right to disqualify you from the procurement process as a result of any such change.
- 5.3 You are reminded of the eligibility requirements that apply to this procurement process at all times. In particular, these include the provisions set out in the Procurement Act 2023. Any change in your eligibility must be notified immediately to Futura in writing and may result in your disqualification from the procurement process.
- 5.4 You must state if you will be using any third-party Suppliers for the goods and if this is the case, you must ensure that all relevant Terms and Conditions are applied within any relevant sub-contract. You will be fully responsible as the prime contractor for all third-party organisations.
- 5.5 In order for the evaluation team to compare all responses on a like-for-like basis, responses provided shall be on the Appendix E - Pricing Schedule. **Any submissions to this documentation that are qualified by the Supplier including details that are based on the Suppliers terms will not be considered any further.**

6 Preparation and format of Responses

- 6.1 Responses, all documents and all correspondence relating to the ITT must be written in English.
- 6.2 You should consider only the information contained within this ITT and supporting documents, or otherwise formally communicated to you in writing when making your offer.

You should remember that only information submitted as part of this response can be considered. Information submitted outside of this process, including in relation to previous or current contracts, cannot be considered.

7 Evaluation

- 7.1 Threshold Questions are indicated with (T) against each question and are listed as follows:

Section	Threshold Reference Number
Quality Questions - References	1.ii and 1.iii

- 7.2 For clarity, failure to meet the threshold will result in your bid been discarded.
- 7.3 The Quality: Price ratio for the evaluation of the Tenders will be 60% Quality: 40% Price, this is broken down within the following table:

Criteria	Weighting
Criteria	All Lots
Quality	
References	Y/N
Service Standards Monitoring	20%
Staffing	10%
Customer relationship	10%
Service flexibility and communication	10%
Social Value	10%
Total	60%
Price	
Pricing	40%
Total	100%

- 7.4 Individual quality percentages are broken down further against each question.

Quality

- 7.5 Quality will be evaluated against the answers provided to these questions (a maximum of one side of A4 for each question):

Question Number	Questions
	Education Sector experience
1	<p>i) Please provide details all the school contracts you hold, with a contact name, their position, telephone number and e-mail address.</p> <p>ii) Confirmation that Futura can contact the referees provided in the answer</p> <p>iii) No unsatisfactory references have been received from any of the references provided in answer</p> <p>Note to Organisations The threshold requirement applies to two elements and is met when: 1) confirmation that the Trust can contact the referees is given and 2) no unsatisfactory references are received, i.e. if an unsatisfactory reference is received the Trust may exclude the organisation from the tender shortlist.</p>

	Service standards monitoring
2	What mechanisms do you have to self-audit that the contract standards are being consistently achieved by your staff? What visibility will be given to Customers of these contract standards. Please provide examples of this monitoring and the visibility to Customers e.g. online portals, monthly reports etc

	Staffing
3	<p>Please describe how you will recruit suitable individuals and how you will train them as necessary. How do you manage the DBS checks at your organisation and ensure staff without DBS checks do not attend site and follow Trust safeguarding procedures?</p> <p>How do you ensure any new staff are given training, so they arrive at the Schools' sites knowing what services are required? How do you ensure that the staff attending site are regularly the same staff members?</p>

	Customer relationship
4	How will you communicate with the Customer (e.g. school management and staff) to review the service, develop it as necessary, and also deal with day-to-day issues as they arise? Please detail the procedures you have in place to escalate and address issues raised by customers.

	Service flexibility and communication
5	What flexibility do you have to change the days of site visits in response to poor ground conditions, inclement weather or school events? How do you communicate these changes to school staff.

	Social value
6	The delivery of Social Value is a key priority of Futura through its procurement activities. Three key themes embedded that we will be looking to work with the

	<p>successful provider to deliver are: Employment and Learning, Environmental and Social.</p> <p>Can you outline how you would propose to support the Trust to achieve positive outcomes? Marks will be allocated on the basis of:</p> <ul style="list-style-type: none"> • Social outputs • Economic outputs • Environmental outputs
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Notes	<p>Notes on answering this question</p> <p>Social value is a compulsory element for all public sector procurement activities, the below notes may help you formulate your response.</p> <p>For Social outputs you may want to include any community engagement and education you are involved with and could offer, especially to Customer schools. You can include social inclusion and wellbeing initiatives including inclusive employment practices. If you encourage staff to volunteer time or have involvement in charitable activities - this can also be included.</p> <p>For Economic outputs: what is your local economic impact, do you employ from our local area and use local suppliers?</p> <p>For Environmental impacts: what eco-friendly practices do you use? Are you involved in green waste management. What steps have you undertaken to reduce your carbon footprint e.g. electrical vehicles or equipment, energy efficient route planning</p>
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- 7.6 Please submit answers to these questions in your response documentation in the document Appendix One Procurement Specific Questionnaire (PSQ), which will form part of the contract. Since the introduction of the Procurement Act 2023, suppliers participating in procurements are expected to register on a central digital platform (CDP). You can do this via the following link. <https://www.gov.uk/find-tender>. The PSQ has more detail on this process.
- 7.7 Due to the Trust's focus on Quality, any Tendering Organisation that scores less than 30% out of the 60% available for Quality, will not be eligible to be awarded the contract.
- 7.8 The answers provided for the Questions will be scored against a pre-determined model based on a 0 to 5 Scoring Matrix.

0 to 5 Scoring Matrix	
0	Inadequate - No response is provided or the response is not relevant to the question.
1	Serious Reservations - The response significantly fails to meet the standards required, contains significant shortcomings and/or is inconsistent with other proposals.
2	Slight Reservations - The response falls short of achieving the expected standard in a number of identifiable respects.
3	Slight Concerns - The response meets the requirement in certain material respects and provides certain information which is relevant, but which is lacking or inconsistent in material respects.
4	Potential - The response meets the requirement in most material respects, but is lacking or inconsistent in some minor respects.

5	Capable - The response meets the requirement in all material respects and is extremely likely to deliver the required output/outcome.
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Price

- 7.9 Price will be evaluated against the following methodology. The lowest TOTAL TENDERED COST (as identified in the Pricing Schedule) would receive the full price percentage, with other tendered prices pro rata from this.
- 7.10 For example, Supplier A's total price is £1,000, and Supplier B's total price is £2,000 then 'A' would receive the maximum 40% being the most competitive. 'B' would receive the 20%.
- 7.11 Appendices A,B,C and D detail the specification and pricing should be submitted on Appendix E
- 7.12 Please be advised that following the evaluation process an independent external credit report will be run to confirm the winning Tenderers financial stability. The credit report will be obtained with the information you supplied (i.e. Company Name, Registration Number and Registered Address). If the report highlights areas for concern, or the Trust is unable to run a full report (because you are a newly formed business) you may be asked to supply additional information (i.e. company accounts, cash flow statements etc) to enable the Trust to undertake a more thorough in depth analysis. If the Trust deems that the winning Tenderer's financial position presents a high risk to the Trust and appropriate mitigating actions cannot be identified, the Trust reserves the right to eliminate the Tenderer from the tender process and reconsider the other submissions received.

Award

- 7.13 The price percentage attributed will be added to the respective quality score to give an overall price / quality score for each submission received.
- 7.14 Once Futura has reached a decision in respect of the Contract award, it will notify all tenderers and observe a standstill period in accordance with the Public Contracts Regulations 2015 before entering into any contract.
- 7.15 The contract award notification will be sent to each Tenderer. The Trust will inform all unsuccessful Tenderers of the identity and relative advantages and characteristics of the successful tender as compared with the addressee's tender.
- 7.16 Acceptance of the tender shall be in writing and shall be communicated to the successful Tenderer. The successful Tenderer shall upon request of Futura execute a formal Contract in the form contained in the Contract documents.
- 7.17 The Trust reserves the right in exceptional circumstances and after the opening of tenders to enter into discussions with any Tenderer.
- 7.18 The Trust reserves the right in exceptional circumstances, where the awarded Tenderer withdraws or The Trust terminates within the first 3 months, to reopen the tender evaluation and award to the second Most Economically Advantageous tender. The trust will notify all tenderers and observe a standstill period in accordance with the Public Contracts Regulations 2015 before entering into any contract.

General

- 7.19 Suppliers should note that if Futura either decides not to accept any submission or to abandon the procurement process at any stage it will not be responsible for any costs which Suppliers may incur/have incurred as a consequence of Futura's decision.
- 7.20 You should only complete the Further Competition after you have read and fully understood all the contract documents.
- 7.21 Once the Contract has been awarded no allowance can be made for any errors, omissions or misjudgements provided in the documentation.
- 7.22 Prices are deemed to be inclusive of all overheads and are exclusive of VAT.
- 7.23 Before you complete the ITT please ensure that you understand clearly what Futura's requirements are about and its duration.
- 7.24 If you require clarification of any part of this document, please raise a clarification. Clarification questions raised and answers provided that are deemed appropriate to all Suppliers will be circulated via the In-tend portal.
- 7.25 Suppliers may modify their submission by uploading a replacement ITT before the deadline date and time. Any previous submission/s will be disregarded and substituted accordingly. You must include your full submission again and not just the replacement documentation, it should be noted that you will not be able to withdraw from this arrangement without risking legal liability for breach of contract.
- 7.26 The form of Contract the successful Supplier will be required to sign will be uploaded to the In-Tend portal shortly.
- 7.27 Please complete the Appendix E - Pricing Schedule Tender 2025 and upload to the In-tend portal.
- 7.28 Details of Futura's service specification is included in Appendix A - Work Specification and Appendix B - PPM Specification
- 7.29 Details of Futura's assets are included in Appendix D - Schedule of equipment- 21.02.25