

NCCT43217

Provision of Air conditioning Servicing and Maintenance

Invitation to Tender

**Monday, 4th August, 2025**

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# Context and requirement of the procurement

* 1. Context

Norfolk County Council (NCC) Corporate Property Team is commencing a variety of tendering activity for its Summer Procurement Programme 2025-2031. This project is part of that program and is specifically related to the sourcing of a provider to deliver Air conditioning Servicing and Maintenance.

* 1. Requirement

Norfolk County Council (NCC) is seeking proposals from qualified providers to deliver comprehensive compliance inspections, maintenance, and certification for our air conditioning systems, including split systems, multi-split, VRF/VRV systems, and packaged or ducted AC units installed across the Council’s property portfolio.

The NCC estate covers circa 200 properties including libraries, museums, fire stations, residential and semi residential properties for Children’s and Adult Social Services, offices, Traveller sites, farms, surplus and vacant properties. For a full list of properties, please see annex 2.3.

Full details of the requirement can be found in (Annex 2) the Service Specification, which forms a Schedule to the Terms and Conditions.

# Correspondence and clarifications

All correspondence and clarifications will be issued via In-Tend. Please make sure your details are correct and that you check the system regularly. We advise adding a second person or a team to your In-Tend account for contingency.

Any internal reviewers such as board members, trustees or partners who may raise issues must be engaged early to ensure points of clarification and any commercial issues that may affect your bid can be raised with us by the clarification date.

If you encounter any difficulties whilst using the system you can contact the In-Tend support team by phoning 0845 557 8079 or +44 (0) 114 407 0065 or by emailing [support@in-tend.co.uk](mailto:support@in-tend.co.uk).

# About this procurement document

* 1. The main parts of the first section of this procurement document

|  |  |
| --- | --- |
| Section | Purpose |
| Advice and instructions to Applicants | Tells you how to upload your application and what you must do if you wish to take part in the tender. |
| Procurement Process Information and Procurement Timeline | Sets out key details about the procurement process and the anticipated dates for key elements in the procurement process. |
| Contract Data | Tells you what the terms of any contract entered into under the tender will be. |
| Receipt and Evaluation of Applications | Tells you what we will do with applications we receive, how we will evaluate them and our rights and obligations in respect of the receipt and evaluation process. |
| Evaluation Information | Contains key information that we will use in the evaluation process, including how we will score responses. |

|  |  |
| --- | --- |
| **Important Legal Notice** | Sets out the basis on which we will conduct the tender exercise. |

* 1. Forms for completion by Applicants

The forms that make up the parts of the document that are to be completed by Applicants are labelled A to Z. The forms that you must complete, and return are contained in this document unless otherwise indicated.

**Please note that you must be registered on the Government’s Central Digital Platform, Find a Tender Service, or we will not be able to accept your bid.**

Information about the Government’s Central Digital Platform can be found online at [Find a Tender Service](https://www.find-tender.service.gov.uk/) and [Central Digital Platform - factsheet (HTML) - GOV.UK](https://www.gov.uk/government/publications/procurement-act-2023-short-guides/central-digital-platform-factsheet-html?utm_source=phpList&utm_medium=email&utm_campaign=Procurement+Act+Update+%285th+February+2025+-+Issue+%234%29&utm_content=HTML).

Further details about the forms are contained in sections 7 and 8, including which forms are and are not being used in this procurement. The forms labelled A to Z are:

|  |  |
| --- | --- |
| Section | Purpose |
| Form A – Details of Applicant | This tells us about you and your organisation and who is applying. |
| Form B – Grounds for exclusion | This form tells us whether there are any grounds under which we will have to exclude you, and any sub-contractors you might rely on to deliver the contract, from bidding. |
| Form C – Compliance with minimum Standards | This form checks your experience and whether you hold the relevant experience and registrations where necessary. It includes minimum standards such as finance and Health and Safety and other checks where relevant to the contract. |
| Form D – Willingness to accept terms and conditions as published | This form checks whether you are prepared to enter into the contract without change and whether you hold the relevant insurances. |
| Form E | Not Used for this Procurement |
| Form F – Quality | This form has the Quality Questions you are required to complete and submit as part of your bid submission. |
| Form G – Price | This form is about the price you will charge for the service, |
| Form Z – Applicant’s checklist and declaration | This form is your checklist to ensure that you have included everything required and your declaration that you are prepared to provide the contract as tendered, under the terms and conditions issued. |

* 1. The following documents are attached and will form part of the contract

|  |  |
| --- | --- |
| **Section** | **Purpose** |
| **Schedule 1: ITT** Instructions to Tenderers | ‘This document’ providing necessary instructions and information to enable bidders to submit compliantly. Provides timescales and process descriptions associated with the tendering next steps. |
| **Annex 1:** Terms and Conditions | The terms and conditions referred to in the Contract Data |
| **Annex 2:** Specification and requirements schedule alongside supporting information | Tells you about the context for this procurement and the specification for the goods and/or services we require. |
| **Annex 3: Form G** Pricing Schedule Response Template | Is the document that bidders are required to price and submit as part of their tender document. This document must be fully completed with a price provided for each service line sought. |
| **Annex 4: Form F** Quality Questions Response Template | Is the document that bidders are required to complete as part of their tender document. (This should be one full Word document submission) |
| **Annex 5:** Performance Management & KPIs | This document is to share with the bidders what the KPIs and performance management process will be for this contract. |

* 1. Obligation to consider Small and Medium Enterprises

The Council has considered SMEs and as a result:

* Insurance requirements within the tender have been assessed as fair against the subject matter of the contract; and
* Insurance at the levels required is not expected to be purchased until a contract is awarded; and
* Limits of liability in the contract have been assessed as reasonable against the subject matter and value of the contract; and
* Performance management reporting is at the minimum required for the Council to be assured of effective delivery.

# Advice and instructions to Applicants

* 1. Issues to consider before bidding

We suggest that Applicants consider the following issues before deciding whether to bid:

* 1. Have you read the Specification and the minimum requirements in Form C, and are you able to provide the service? If you aren’t certain, ensure you seek early clarification.
  2. If there are strict deadlines for implementation or delivery, are you able to meet them?
  3. Is there anything in the documents that you think would prevent you from bidding? If so, please request clarification to ensure there isn’t a miscommunication.
  4. Tender preparation

When preparing your tender, it is important to consider the following:

1. Have you read all the instructions, the documents attached and taken in to account any indicative budget provided in the documents or contract notice?
2. Are you registered on the Government’s Central Digital Platform, Find a Tender Service? More information is available at [Find a Tender Service](https://www.find-tender.service.gov.uk/) and [Central Digital Platform - factsheet (HTML) - GOV.UK](https://www.gov.uk/government/publications/procurement-act-2023-short-guides/central-digital-platform-factsheet-html?utm_source=phpList&utm_medium=email&utm_campaign=Procurement+Act+Update+%285th+February+2025+-+Issue+%234%29&utm_content=HTML).
3. Tenders should be clear and concise and in Form F must describe how you will provide the service being tendered rather than just stating that you will provide the service.
4. Bids that are ambiguous or generic in their response or don’t describe how the service will be provided are unlikely to score well. In our experience, tailored solutions that have taken in to account the Council’s requirements in their answers usually score better than generic responses that have not.
5. If the page count is causing you significant issues with answering a question thoroughly, please raise this as a clarification.
6. Please note that the evaluation panel will be made up of people with different experiences and skills and you should take this into account when writing your response.
7. When completing the price schedule at Form G, have you ensured that your price is fully inclusive of all costs of providing the service in accordance with the contract? We cannot accept bids that have been caveated (see Instructions to Applicants below). If you are unclear about pricing, please seek clarification.
   1. Return of your application
8. If you intend to submit a Invitation to Tender, please ensure that you arrange to return the documents by the date and time stated. The Council is under no obligations to accept late responses to the Invitation to Tender.
9. You do not need to submit any of the first section of this Invitation to Tender: you only need to submit the Forms from page 27 onwards.

How to upload and submit your application

1. Log in to In-Tend and navigate to “My Tenders” under the “Tenders” tab near the top of the page. Locate the procurement that you are applying for and click “view details”.
2. Click on the tab where you found the tender documents for download. Depending on the procurement this may be labelled as “Request to Participate”, “Conditions of Participation”, “ITT” or “Invitation to Tender”.
3. Scroll down the page until you see a button in the centre of the screen entitled “Attach Documents”. Click on this and it will take you into your computer to select and attach files. Select the file you need, click “Open” and it will upload the document to the screen. Repeat these actions until everything you wish to attach as part of your application is displayed on the webpage, click on the “Submit Return” button.
4. If you have made a mistake or forgotten to upload a document, you can repeat this process. You may submit your application multiple times, but only the final submission will be evaluated.
5. We advise that you leave plenty of time for upload and submission of your documents to allow for any possible problems with internet or power.
   1. Instructions to Applicants

Applicants must follow all the numbered instructions below.

First steps

1. If you take part in this procurement exercise you will be bound by the terms stated in the Important legal notice. You should review this notice carefully.
2. Applicants should view the Procurement Privacy Notice on the Council’s website <https://www.norfolk.gov.uk/what-we-do-and-how-we-work/open-data-fois-and-data-protection/data-protection/privacy-notices/procurement-service-privacy-notice> and must raise any concerns about the Privacy Notice and how personal information will be handled during the procurement process without delay.

Language

1. All questions, notices, tenders, supporting documents and correspondence are to be submitted in English.

The clarification process

1. If there is anything unclear or you think that you need more information, you must send in a clarification question as early as possible in the process and in any case before the final deadline given in the Procurement Process Information and Procurement Timeline. Questions must be submitted via In-Tend correspondence and must be associated with the correct project to receive a response. Clarification questions will be answered on a regular basis through the clarification facility on In-Tend.
2. Once the final deadline is passed, no new questions may be sent in but you will have a final chance to seek clarification of answers already given. You must submit any such request within the period stated in the Procurement Process Data.
3. Tenders must be made against the contractual terms referred to in the Contract Data (Annex 1), without qualification or caveat. We do not expect to change the contract terms but if, exceptionally, you want to raise any issues about them you must do so at an early stage in the clarification process. You should not submit extensive proposals for change. We may issue revised contractual terms applicable to all bidders, and if we do so your tender must be submitted against those terms that represent the latest version associated with this tender.

Content of the application

1. In preparing your application you must assume that the evaluators know nothing about your organisation.
2. Throughout the application, you should reflect the Statement of Requirements or Service Specification. To assist you in achieving the highest scores, you should review the “Descriptors for the allocation of quality scores” in the Evaluation Data and write your answers accordingly.
3. You have an overriding obligation to exercise your skill and judgment, to ensure that your solution is fit for purpose and to warn us if, in your opinion, our proposed application of your solution would result in a poor or unacceptable outcome for us.
4. Different questions may be marked by different evaluators and not all evaluators will have read your entire application. The answer to each question must be self-contained. Answers such as “see answer to question x” are not acceptable. You must not include brochures, leaflets or other attachments unless specifically requested. If you do, they will not be read, except where an Applicant has submitted a completed European Single Procurement Document.
5. The forms for completion must be reproduced and completed, except where we say otherwise.
6. So that they are readable, answers must be in a minimum of 12-point font, with line spacing of 1.2 times. Please do not submit separate documents per Form F Quality Questions. One word document response only is required with each of the Questions clearly stated then proceed to answer all elements of that questions before moving onto the next Question and response.

**Please note Your Price submission should be labelled as a separate Annex 3 Form G (Excel document) and not included in the Annex 4 Form F Quality return as these elements will be evaluated by different evaluators.**

1. You must keep to the given word or page limits for each question.
2. Documents must not contain any embedded objects which appear in the printed copy as icons, rather than in full.
3. It is your responsibility to make sure that your application is complete and unambiguous.
4. Bids must be your own original work and any bids that are plagiarised will be rejected. If you have collaborated with a third party to develop your response, this must be clearly explained within the response and any quoted material within a submission must be attributed. If you have used AI, Large Language Models or machine learning software to generate parts of your response, you must declare which elements of the bid were so developed, and that the bid is an accurate reflection of how you will provide the goods, services or works bid.

Completion of the application

1. You should not complete and submit your application until after the clarifications have closed.
2. Your application must consist of all the documents listed in the checklist at Form Z. You must include all attachments requested but should include no other documents (and any other document will be disregarded by the Council when conducting its evaluation).
3. On finalising your application, you must complete the checklist at Form Z.

Submission

1. Your submission must be uploaded and submitted before the deadline specified in the Procurement Process Data. We are under no obligation to consider any application which arrives after the deadline.

Multiple bids

1. Multiple applications from a given prime contractor or consortium will not be evaluated by the Council.
2. An applicant may act as the proposed prime contractor for one bid, and a proposed sub-contractor for another.
3. However, an applicant may act as:

* the proposed prime contractor for one bid, and a proposed sub-contractor for another; or
* the proposed prime contractor for one bid, and a proposed consortium member for another; or
* a consortium member for more than one bid.

1. Where an Applicant is involved in more than one bid, all relevant forms must be completed for each bid.
2. Where they form part of more than one bid, Applicants shall pay particular attention to the need to avoid collusion in pricing and commercial terms.

Instruction 26 Norfolk County Council reserves the right to make no award in respect to this project at its sole discretion and without liability. Bidders when submitting their bid do so on this understanding and submission basis.

# Procurement Process Information and Procurement Timeline

* 1. Timetable and information

The procurement timetable, outlined below, is for information and potentially subject to change. The Council reserves the right to amend any aspect of the timetable during the procurement and evaluation process.

|  |  |
| --- | --- |
| ****Information**** | Details |
| ****Procurement reference number**** | NCCT43217 |
| ****Procurement title**** |  |

|  |  |
| --- | --- |
| **Date contract notice dispatched to publisher** | 4th August 2025 |
| **Procurement procedure** | Competitive flexible procedure as defined in the Procurement Regulations 2024 and the Procurement Act 2023. |
| **Justification for decision not to subdivide into lots (section 18(2)(b) of the Procurement Act 2023)** | The Requirement does not have related elements which can be divided into lots. NCC require one service contractor to deliver the full scope of service against its specification. |
| **Final deadline for submission of clarification questions relating to Invitation to Tender** | 09:35 AM UK time on Thursday, August 21, 2025 |
| **Deadline to request further explanation about clarification answers (no new questions to be introduced)** | Midnight UK time on the third working day after the Council sends its final answers to the clarification questions received before the above deadline |

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| **Date and time for return of Invitation to Tender** | 12:00 Noon UK time on Thursday 04th September 2025 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Expected date for issuing Contract Award notice and for standstill period to commence** | Contract Award Notice will be published to on Find a Tender Service. Start of standstill will be on 8th October 2025 (Standstill will then last 8 working days) | | |
| **Expected date for standstill period to finish** | Midnight UK time on Friday, October 17th, 2025 | | |
| **Soft Launch – Contractor Mobilisation** | | | 20th October 2025 |
| **Contract Close** | | | November 2025 |
| **Contracting Authority’s name and address** | | Procurement Sourcing Team  Norfolk County Council  Floor LG County Hall  Martineau Lane  Norwich NR1 2DH  United Kingdom  **DO NOT SEND ANY CORRESPONDENCE BY POST** | |
| **Correspondence** | | All correspondence and clarifications regarding the procurement should go through In-Tend: <http://In-Tendhost.co.uk/norfolkcc> | |
| **Address for submission of tender documents** | | | All tenders must be submitted via the In-Tend portal. |
| **Period for which offers must remain open for acceptance** | | | 90 days from the tender submission deadline |
| **Award decision and standstill process** | | | The Council shall have no obligation to Applicants concerning debriefing beyond those contained in the Procurement Act 2023 and the Procurement Regulations 2024. The Council will observe a standstill period and will not enter into a contract until after midnight on the eighth working day from when the contract award notice has been published. |
| **Go Live Date** | | | 1st December 2025 |

* 1. Competitive Flexible procedure

**We reserve the right during subsequent stages of the Competitive Flexible procedure to refine the award and or assessment criteria and may alter the relative importance of the award and or assessment criteria.**

**Any amendments will therefore be communicated in full at the appropriate time.**

**The structure of this Competitive Flexible Process is detailed below.**

**Bidders will be invited to complete all schedules of the ITT Documentation pack and submit their initial bids including their Quality & Price submissions. Please note Your Price Submission should be labelled as a Annex 3 Form G (Excel document) and not included in the Annex 4 Form F Quality return as these elements will be evaluated by different evaluators.**

**Once bidders return their bid submissions via INTEND the first level of assessment will be a compliance check against the ITT instructions contained in this whole document. This will be followed by the Debarment List and Excluded/Excludable suppliers information checks and the bidder’s financial assessments as described (Form C).**

**This will then be followed by an assessment of the remaining Form A,B C and D.**

**Those bidders that pass each of the above assessments will then have their ITT Quality Questions Annex 4 (Form F) evaluated. Annex 3 Form G Price will be evaluated at the same time by separate evaluators to that of the Quality assessors.**

**Pricing Clarifications and bidding assumptions will be assessed and dialogue maybe required during the pricing assessment stage. . NCC does however reserve the right not to dialogue at the pricing assessment stage and proceed to award.**

**Where bidders pricing is incomplete and this is not able to resolved / corrected within a calendar week of notifying them then they will score a zero for their pricing submission and not be eligible for award with their bid being rejected.**

**Any bidder who did not make the Quality Threshold Score (their pricing submissions will be disregarded with no feedback provided on the Pricing element as this will cease to be assessed)**

**All parties that Pass the Quality Threshold score will progress to having their Price scoring added to the Quality to determine a rank order of eligible bidders. The highest scoring bidder (when quality and price are added together)\_ will be awarded the contract subject to effective conclusion of standstill.**

**Those bidders which were ranked outside of the Top scoring outcome will also no longer be eligible for award and will be classed as an unsuccessful bidder in this procurement process.**

# Contract Data

* 1. Contract information

|  |  |
| --- | --- |
| ****Contract information**** | Details |
| **Conditions of contract** | As set out in Form D of the Conditions of Participation. |
| **Contract commencement date** | The **contract** will commence on the day both parties sign the Final Version of the Agreed Contract. |
| **Required Service Commencement Date** | The official start on site is Monday, December 1, 2025 however contractor mobalisation can commence from 20th October to ensure readiness. |
| **Term** | 36 months from the Required Service Commencement Date |

|  |  |  |
| --- | --- | --- |
| **Contract extensions** | The Contract may be extended by up to 2 x 12 months at the Council’s discretion. | |
| **Permits, consents and licences** | | As set out in Form D |
| **Required insurances and limits of liability** | | As set out in Form D |

# Receipt and evaluation of Applications by the Council

General

* 1. We will admit, evaluate and where appropriate reject Applications reasonably, impartially and as set out below. We make no other commitments concerning our admission, evaluation or rejection of Applications.
  2. New and forgotten documents may not be able to be considered after the tender deadline has passed.

Clarification

* 1. It is your responsibility to make sure that your application is clear, complete and unambiguous. We may ask you to clarify your answers provided that in our judgment this does not adversely affect the integrity and fairness of the exercise, but we are not obliged to do so, and other bidders may be notified that clarifications have been sought and what it was regarding.

The Public Services (Social Value) Act 2012

* 1. Social value considerations (the economic, social and environmental well-being of the Authority’s area of operations) have not been included in this tender.

**Compliance with Instructions to Applicants**

* 1. You must comply with the Instructions to Applicants or you risk your Application being rejected. A compliance check of all tender instructions will be done when you submit your bids please ensure that any request for response/information by the bidder in this ITT document has been complied with and submitted as part of your organisations tender response pack. All documents should be labelled clearly and correlate to the number/question ref as originally stated in this ITT.

Grounds for exclusion (Form B)

* 1. If any of the grounds for exclusion set out in Form B applies, we will normally reject your Application (and tell you that we have done so).
  2. If any bidder appears on the Government’s debarment list, that supplier will be excluded.
  3. Exceptionally, and in accordance with any relevant legislation, we may exercise our discretion and permit your Application to be considered if any of the discretionary grounds for exclusion apply.

Compliance with minimum standards (Form C)

* 1. We will check that you have provided, in your answers on Form C, evidence that you meet the minimum standards set out there. We will not be able to further consider your application if in our opinion you do not meet the minimum standards. [Pass or Fail]

Willingness and ability to comply with contractual requirements (Form D)

* 1. We will check that you have confirmed that you can enter into the contract under the specified terms and conditions (without modification) and hold appropriate levels of insurance (or are willing to obtain it).

# Evaluation Information

|  |  |
| --- | --- |
| ****Evaluation information**** | Where |

|  |  |  |
| --- | --- | --- |
| **Grounds for exclusion** | | As set out in Form B |
| **Minimum standards including technical and professional capacity** | As set out in Form C | |
| **Willingness and ability to comply with contractual requirements** | As set out in Form D | |
| **The Evaluation and approach specifically relating to the Competitive Flexible Procedure Process has been explained in section** | **5.2 of this document** | |

**Award criteria**

**Weighting of quality questions (Form F1)**

|  |  |  |
| --- | --- | --- |
| ****Reference**** | ****Subject area**** | ****Weighting as a percentage of the marks available**** |

|  |  |  |
| --- | --- | --- |
| **SUB-TOtal** | **Price Weighting Available** | **50%** |
| **SUB-Total** | **Quality Weighting Available** | 50**%** |
| **Total** |  | **100%** |
| **Quality threshold**  **(minimum acceptable overall quality score)** | | 30 marks out of 50 |
|  | |  |

**Descriptors for the award of quality marks**

|  |  |
| --- | --- |
| **The mark to be awarded is that for which the descriptors most closely match the tenderer’s response** | **Mark awarded** |
| An excellent response that is realistic, appropriately detailed and specific. Any weakness is immaterial and:   * the approach embodies accepted good practice in all material respects and offers excellent levels of (as appropriate) functionality, performance, environmental performance, ease of use and other relevant characteristics. * the response is tailored to the requirement wherever relevant and, where relevant, to specific circumstances. * all material aspects of the question are fully answered, and the approach described fully meets all material aspects of the requirement. * where relevant the proposal is ambitious in terms of outcomes, and sets out a convincing, coherent and evidence-based approach to achieving the outcomes claimed; and * where relevant, the organisation, capacity, qualification and experience of staff assigned to performing the contract are excellent. | 5 |
| A good response that is realistic, appropriately detailed and specific and with only minor weaknesses, where:   * the approach generally embodies accepted good practice and offers good levels of (as appropriate) functionality, performance, environmental performance, outcomes, ease of use and other relevant characteristics. * with minor or no exceptions, the response is tailored to the requirement where relevant and, where relevant, to specific circumstances. * all material aspects of the question are fully answered, and the approach described meets the material aspects of the requirement, with no or minor exceptions. * where relevant the proposal seeks to deliver a good level of outcome, and sets out a convincing, coherent and evidence-based approach to achieving the outcomes claimed; and * where relevant, the organisation, capacity, qualification and experience of staff assigned to performing the contract are good, with only minor deficiencies. | 4 |
| A satisfactory response that is realistic in all material respects, and that is at least sufficiently detailed and specific to give general clarity about what is to be delivered and how. There are some weaknesses, but all of the following requirements are met:   * the approach does not materially conflict with accepted good practice and generally offers acceptable levels of (as appropriate) functionality, performance, environmental performance, ease of use and other relevant characteristics. * all material aspects of the question are fully answered, and the approach described meets the material aspects of the requirement, with no or minor exceptions. * while the response may be somewhat generic, it is not inappropriate to the specific circumstances or too high-level to give reasonable clarity and confidence. * where relevant the proposal seeks to deliver acceptable outcomes, and sets out a reasonably convincing, coherent and evidence-based approach to achieving the outcomes claimed; and * where relevant, the organisation, capacity, qualification and experience of staff assigned to performing the contract are generally acceptable. | 3 |
| A rather deficient response that is not of a sufficient standard to meet all the bullet points set out above for a score of ‘3’ but that is not considered so unsatisfactory as to raise serious doubts as to the prudence of entering into a contract incorporating the response, as further described in the descriptor below for a score of ‘1’. | 2 |
| A response which shows **some or all** of the following characteristics such that in the round a prudent contracting authority would have serious doubts about entering into a contract incorporating the response:   * there being insufficient detail or specificity to be clear, wholly or for a material aspect of the requirement, what is to be delivered and how. * the approach materially conflicting with accepted good practice and/or failing to offer acceptable levels of (as appropriate) functionality, performance, environmental performance, ease of use or other relevant characteristics. * material parts of the question(s) not being answered or material parts of the response being unrealistic or the approach described, in some material respect, appearing not to meet the requirement or not to comply with the law. * the approach described appearing, in some material respects, not to deliver expected levels of (as appropriate) functionality, performance, environmental performance, ease of use or other relevant characteristics. * the approach conflicting with accepted good practice in some material respects. * the approach being in material part inappropriately generic or a poor fit with the specific circumstances or context. * the approach being unacceptably unambitious in terms of outcomes or the approach to achieving the claimed outcomes being materially unconvincing; and/or * where relevant, the organisation, capacity, qualifications and/or experience of staff assigned to performing the contract not reaching the expected levels in some material respects.   **If any response receives a score of ‘1’, the entire submission will be rejected.** | 1 |
| No response or a response with insufficient content to allow meaningful evaluation or a fundamentally unrealistic response or a clearly unacceptable response where the weaknesses, individually or in aggregate, are fundamental.  **If any response receives a score of ‘0’, the entire submission will be rejected.** | 0 |

**When evaluators are reviewing your response, they will be considering the following points, as relevant to the question.**

* Detail, completeness and specificity
  + How detailed is the answer about what is to be delivered and how?
  + Are all aspects of the question covered?
  + Is the answer sufficiently specific and, where relevant, tailored to the requirement and the context?
* Is the proposal realistic – for example in (as relevant) timescales, resourcing, identification and mitigation of risks and obstacles, and if relevant stakeholder engagement, cultural fit and/or technical approach?
* Does the proposal accord with good practice?
* Does the proposal meet the requirement in all material respects?
* Is the proposal suitably ambitious in terms of outcomes, and to what extent does it set out a convincing, coherent and evidence-based approach to achieving the outcomes claimed?
* As relevant, the functionality, performance, environmental performance, ease of use and other relevant characteristics provided by the proposal
* Where relevant to the question, evaluate the organisation, qualification and experience of staff assigned to performing the task. For example:
  + Is the structure appropriate to the service to be delivered?
  + Is the balance of front-line, management and support staff appropriate?
  + Are key staff suitably qualified and experienced?

**Final Scoring & Ranking of Bid Submissions as described in Section 5.2 of this Document**

**Annex 4 Form F Quality Evaluation is weighted 50%**

**Each Quality Question has been broken down comprising a total weighting available of the 50% amongst each of the questions. The formula for calculation will be Weighting for each question divided by Maximum Mark available x Score received.**

**Annex 3 Form G Pricing Evaluation is weighted 50%**

**Pricing Clarifications and bidding assumptions will be assessed and dialogue maybe required during the pricing assessment stage. One total price will be summed as representative for the three years of the committed contract.**

**For Price we will then use the formula Lowest Price divided by Bid Price x 50% to calculate the Price Final Score.**

**The Quality and Price will then be added together to give a score out of 100% and bidders ranked accordingly.**

# Important legal notice

**No implied contract**

* 1. Norfolk County Council (“the Council” or, where the context so requires, “We”) does not make any binding commitment to actual or potential tenderers (“Applicants” or, where the context so requires “you”) or to any other party about its conduct of this procurement exercise, other than to abide by its statutory obligations and the express terms of this Important Legal Notice.

**Acceptance of conditions**

* 1. Any Applicant who participates in this procurement exercise shall be deemed to accept the above condition and the conditions set out below. These conditions form the entire understanding between the parties about the conduct of the tender exercise.
  2. The Council will not accept any change to the terms of this legal notice and in the event that any Applicant submits any tender or notice which seeks to change these conditions the purported change shall be void, even if the Council considers the Applicant’s completed request to participate or tender. Any concerns with terms and conditions must be raised during the clarification period.

**Communications, information and notices**

* 1. Applicants shall not, in connection with this procurement exercise, rely on any communication from the Council (including without limitation any notice published by the Council and any information published on any web site) unless it specifically states that it concerns this procurement exercise and bears the reference number stated on the front page of this document. Applicants shall not rely on any communication which is not in writing.
  2. Information supplied by the Council is subject to constant updating and amendment in the future and is necessarily selective and is supplied for general guidance in the preparation of tenders. It does not purport to contain all of the information which Applicants may require and Applicants must satisfy themselves by their own investigations about the accuracy of such information.
  3. The Council has taken reasonable steps to ensure, as at the date of each document supplied by the Council in connection with this procurement (“Procurement Document”), that the facts which are contained in or provided with each such document are true and accurate in all material respects. But the Council does not make any representation or warranty as to the accuracy or completeness of the Procurement Documents, or the reasonableness of any assumptions on which they may be based. The Council accepts no liability to Applicants however arising, whether resulting from the use of the information provided, or from any omissions from or deficiencies in the information. As such, the Council cannot accept responsibility for any inaccurate information obtained by Applicants.
  4. Any notice from any person in connection with this procurement exercise must be sent to the Contact Name and Address stated in the Procurement Process Data below in accordance with the relevant timescales.

**Amendments to the procurement process**

* 1. The Council may at its sole discretion change any aspect of,or stop this procurement exercise at any point and if it stops the exercise (or the procurement of any lot or lots therein) need not provide any Applicant with the scores allocated in any marking exercise already undertaken or the reasons for the allocation of those scores.

**Applicants’ costs**

* 1. The Council will not under any circumstances be liable to pay Applicants for any costs incurred as a result of their participating in this procurement exercise.

**Standstill period and contract award notice**

* 1. The Council shall have no obligation to Applicants concerning debriefing beyond those contained in the Procurement Regulations 2024. The Council will observe a standstill period and will not enter into a contract until after midnight on the eighth working day beginning with the day when the contract award notice is published.
  2. Applicants hereby agree that they will not reveal the Council’s provisional award decision to any person (other than staff, Directors, trustees or professional advisers who have a need to know) until the completion of the standstill period, and that they will place a similar obligation on any person to whom they notify the Council’s provisional decision.

**Confidentiality, Freedom of Information and Intellectual Property**

* 1. The Council is subject to laws about access to information including the Freedom of Information Act 2000, the Environmental Information Regulations 2004, the Audit Commission Act 1998 and the Procurement Act 2023. The Council may - despite any claim made by any Applicant that any information is given in confidence or is confidential in nature – be required to release any information it holds in accordance with the law, subject to the Council’s discretion concerning any applicable exemption or the application of any public interest test. It is important to note that information may be commercially sensitive for a time - for example, during a tender process - but afterwards some of that information it may not be, while other information may remain commercially sensitive for a longer period. The timing of any request for information may be extremely important in determining whether or not information is exempt. Applicants should note that no information is likely to be regarded as exempt forever.
  2. The Council does not in general consider the identities of the successful bidder or of unsuccessful bidders to be commercially confidential. It
  3. will publish the details of the successful bidder(s) as required by the Procurement Regulations 2024 and the Local Government Transparency Code;
  4. will provide unsuccessful bidders with a copy of successful bidders’ assessment summaries, redacted only to the extent that they contain information that is sensitive commercial information and where there is an overriding public interest in its being withheld from publication or other disclosure;
  5. will publish such details of unsuccessful bidders as are required by Regulation 27 of the Procurement Regulations 2024; and
  6. may release the identity of unsuccessful bidders in response to FOI requests without consultation with the bidders concerned once the contract has been awarded.
  7. Any working documents produced by the Council in the course of evaluation shall remain confidential to and the property of the Council and need not be retained by the Council.
  8. All intellectual property rights in the Procurement Documents and all materials provided by the Council or its professional advisers, consultants or information providers in connection with this tender and tender process are and shall remain the property of the Council and/or its professional advisers, consultants and/or information providers. The information they contain shall be used only for the purpose of preparing a tender and delivering any resulting contract.
  9. The contents of the Procurement Documents together with all other information, materials, specifications or other documents provided pursuant to or in the course of this procurement exercise, or prepared by the Applicants specifically for such purposes, shall be treated at all times as confidential by the Applicants unless put in the public domain by the Council. Applicants may not disclose any such information, materials, specifications or other documents to any third parties or to any other part of the Applicant´s company or group or use them for any purpose other than for the preparation and submission of responses to the Procurement Documents. Applicants may not publicise the Council’s name or the tender without the prior written consent of the Council.
  10. Applicants must seek the approval of the Council before providing to third parties any information provided in confidence by the Council and shall ensure that all third parties to whom disclosure is made shall keep any such information, materials, specifications or other documents confidential and not disclose them to any other third party except as set out above.

**Collusion, canvassing, bribery and corruption**

* 1. Applicants shall not enter into any agreement or arrangement with any other person with the intent that the other person shall refrain from responding to the procurement exercise or submit an excessively high price or an otherwise unattractive or non-compliant offer nor enter into any price-fixing agreement with any other person in respect of this procurement process.
  2. Applicants shall not, in connection with this procurement process or the proposed contract:
  3. offer any inducement, fee or reward to any officer or member of the Council;
  4. do anything which would constitute a breach of section 117(2) of the Local Government Act 1972 or of the Bribery Act 2010; or
  5. canvass any officer or member of the Council in connection with the response/tender about any aspect of the proposed contract or for soliciting information in connection therewith.
  6. If any Applicant or any employee of any Applicant or any third party acting on behalf of any Applicant commits an act detailed in clauses 9.18 or 9.19 or offers, promises or gives any bribe or inducement or makes any improper threat or colludes (or offers or agrees to collude) with any other Applicant in connection with this procurement exercise then, in addition to any criminal sanction such conduct may attract, the Council may:
  7. immediately exclude that Applicant’s offer from consideration;
  8. exclude that Applicant from future procurement exercises;
  9. terminate any contract entered into with that Applicant; and
  10. recover from that Applicant the reasonable costs of re-running this procurement exercise and any consequential losses (including loss of anticipated savings) which result from any delay in letting a contract.
  11. If any person approaches any Applicant seeking any bribe or making any offer to collude in respect of this procurement exercise, that Applicant is to contact the Council’s Head of Law immediately.

**Known Risks**

1. **Known Risks** – In accordance with the Procurement Act Norfolk County Council has published within the Tender Notice and ITT Documentation the presence of a Known Risk. This known risk relates to the non availability of all asset information associated with the portfolio which may impact and require revisions and updated information to be gathered during the contract life. This may also result in modifications to the contract and or pricing schedules that may be required when the asset information becomes known.
2. **Known Risk -** NCC from time to time acquire and or dispose of properties which are no longer needed by services. New acquisitions will be added to contracts via a formal change control and will be subject to rates as part of this tender, while any properties which are removed will also be subject to formal change control. This may result in modifications to the contract and or pricing schedules but with no financial penalties accepted by Norfolk County Council.



NCCT43217

Provision of Air conditioning Servicing and Maintenance

Invitation to Tender

TO BE COMPLETED AND RETURNED BY APPLICANT

Form A: Details of Applicant

**Applicants are to edit the header of this form to insert their name at the top of every page.**

**You must be registered on the government’s Central Digital Platform,** [Find a Tender Service](https://www.find-tender.service.gov.uk/)**, or we will not be able to accept your bid.** **Please include in your bid response a PDF of your information from the Central Digital Platform.**

**Form A is split into different parts.**

**Part 1 of Form A is information relevant to the procurement.**

## Part 1 – basic details

|  |  |
| --- | --- |
| Name of person or organisation tendering |  |
| Trading as… |  |
| Find a Tender Service share code |  |
| Are you bidding in conjunction with another supplier? | Answer ‘yes or no’ |
| If yes, who is the lead bidder? |  |

|  |  |  |
| --- | --- | --- |
| **Person managing bid** | | |
| Ms, Mr, etc |  | |
| Name |  | |
| Address |  | |
| Postcode |  | |
| Country |  | |
| Phone |  | |
| Mobile |  | |
| **Director, partner or trustee overseeing bid** | | |
| Mr, Ms, etc |  | |
| Name |  | |
| Address |  | |
| Postcode |  | |
| Country |  | |
| Phone |  | |
| Mobile |  | |
| **Registered office address** | | |
|  | | |
|  | | |
|  | | |
| Postcode |  | |
| Country |  | |
| **Applicant’s registration number, as applicable** | | |
| Company registration no. | |  |
| Charity registration no. | |  |
| VAT registration no. | |  |
| Other registration no. | |  |
| **Group structure (as applicable)** | |  |
| Name of immediate parent organisation | |  |
| Company registration number | |  |
| Name of ultimate UK holding company | |  |
| Company registration number | |  |
| Name of ultimate parent organisation | |  |
| Country | |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Company size** | | | |
| Are you an SME? (yes/no) | |  | |
| **Type of organisation (select one box only)** | | | |
| Sole Trader |  | Public sector |  |
| Partnership (Unincorporated) |  | Private Company |  |
| Limited Liability Partnership (‘LLP’) |  | Public Limited Company |  |
| Private Co. Limited by Guarantee |  | VCSE, please select:  Choose an item. | |

**Part 2 is** not used at this stage but will be **information relevant to contract management if you were to be successful and is non-mandatory but useful if we have a quick award-to-contract-commencement process.**

## Part 2 – contract management

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Role | Name | Phone | Mobile | Email |
| Contract manager |  |  |  |  |
| Ordering/referral |  |  |  |  |
| Contract queries |  |  |  |  |
| Invoice queries |  |  |  |  |
| Emergency out of hours contact |  |  |  |  |

**If you are not an existing NCC supplier, please complete the BACS form below. We will only pay by BACS transfer.**

|  |  |
| --- | --- |
| Bank Details | |
| Account Type |  |
| Name of Bank |  |
| Address of Bank |  |
| Sort Code |  |
| Account Number |  |
| Building Society Roll Number |  |
| Name the account is held in |  |

## Part 3 – Sub-Contractors

Please list all sub-contractors you will be using for this contract.

Form B: Grounds for exclusion

* **Applicants are to reproduce this Form B, retaining the question text and question numbering, and return it as part of their submission. Applicants are to answer all questions.**
* Applicants must edit the header of this section to insert their name at the top of every page of the forms so that it is clear to evaluators whose bid is whose.
* **Please do not append any documents unless specifically requested below.**
* If you cannot answer ‘yes’ to every question below it is very unlikely that your bid or application will be accepted, and you should contact us for advice before completing this form.
* Please see section 4.4 of this document for how this Form B should be completed if you are bidding as a lead contractor with sub-contractors or as a consortium.
* Applicants and any sub-contractor or member of a consortium who are also completing Form B must complete the self-declarations in relation to this Form B on behalf of all connected persons and entities, in accordance with The Procurement Act 2023 and the Procurement Regulations 2024.

## **B.1 Mandatory Grounds for Exclusion**

**We certify that we are registered on the Government’s Central Digital Platform, Find a Tender Service, and that we are not considered an excluded supplier under any of the provisions in** [**Schedule 6 of the Procurement Act 2023**](https://www.legislation.gov.uk/ukpga/2023/54/schedule/6)**.**

Yes

No

**If you have answered “no”, please provide an explanation below.**

## **B.2 Discretionary Grounds for Exclusion**

**We certify that we are registered on the Government’s Central Digital Platform, Find a Tender Service, and that we are not considered an excludable supplier under any of the provisions in** [**Schedule 7 of the Procurement Act 2023**](https://www.legislation.gov.uk/ukpga/2023/54/schedule/7)**.**

Yes

No

**If you have answered “no”, please provide an explanation below.**

## **B.3 Sub-contractors**

**We certify that the subcontractor(s) we rely on to deliver this contract are not an excluded supplier(s) under any of the provisions outlined in B.1.**

Yes

No

**If you have answered “no”, please provide an explanation below.**

**We certify that the subcontractor(s) we rely on to deliver this contract are not an excludable supplier(s) under any of the provisions outlined in B.2.**

Yes

No

**If you have answered “no”, please provide an explanation below.**

Please note that we will verify the information provided on this Form B with the Central Digital Platform.

We reserve the right to ask you to replace any sub-contractors that you are relying on to deliver the contract that are excluded or excludable suppliers.

Form C: Compliance with minimum standards

* **Applicants are to reproduce this Form C retaining the question text and question numbering and return it as part of their submission. Applicants are to answer all questions.**
* Applicants must edit the header of this section to insert their name at the top of every page of the forms so that it is clear to evaluators whose bid is whose.
* **Please do not append any documents unless specifically requested below.**
* **Responses to this Form C will be evaluated against the criteria at the end of the Form.**

## **Technical or Professional ability**

Our minimum standards for technical or professional ability are that Applicants have the experience, capabilities and qualifications set out in the questions below and are able to provide satisfactory references as evidence of their relevant track record. Please complete each question as instructed.

We need to be satisfied that your organisation has previous relevant experience in providing similar services.

**Do you have a proven track record and extensive knowledge and experience of providing Air conditioning Servicing and Maintenance**

Yes

No

If yes please provide detailed evidence of your organisation’s relevant experience, including details of previous clients and projects (maximum 500 words). If no, please explain how you think that skills you have acquired may be transferrable to this work. Please note that if you cannot evidence a proven track record and extensive knowledge of providing Air conditioning Servicing and Maintenance, your application will fail.

**Answer below** (maximum 500 words)

We need to be satisfied that your organisation has appropriate professional qualifications e.g. as per specification with relevant equivalents to those stated.

* 1. **Does your organisation ensure that individuals employed to deliver Air conditioning Servicing and Maintenance as defined in the specification of requirements hold relevant and current professional qualifications?**

Yes

No

If yes, please provide details of the qualifications and memberships of professional bodies held by individuals who would be working on the contract (maximum 500 words). Please note that if you cannot evidence that individuals employed to deliver Air conditioning Servicing and Maintenance as defined in the specification of requirements hold relevant and current professional qualifications your application will fail.

**Answer below** (maximum 500 words)

## **Performance**

**Has your organisation:**

1. had any contract terminated early for breach of contract in the last 36 months (this applies to any contract you have operated, not just Council contracts)?

Yes

No

1. had any contract amended or varied due to poor performance or contractual non-compliance in the last 36 months (this applies to any contract you have operated, not just Council contracts)?

Yes

No

1. been subject to any performance or warning notices (or similar notices) issued by commissioners or other bodies regarding any contractual or performance issues?

Yes

No

If your answer to any of the above is ‘yes’, please give details on a fully referenced separate sheet explaining what happened and what you have done to put matters right and attach copies of any relevant correspondence with the relevant contracting authority or regulatory body. If you are unable to evidence what you have done to put matters right, your application will fail.

**Answer below** (a guide of 500 words)

To be scored as a pass/fail. If you fail this part of the application, your application will not be considered further.

## **References**

Applicants must have experience of providing the services they are applying to provide. Therefore, we require details of two people that can provide references or two completed certificates of performance from organisations for whom you have provided services of a similar scope to the requirements within this procurement in the last 3 years. Certificates of performance must be attached to your submission and be fully referenced. If applying as a consortium, we require each member to supply details of two referees or certificates of performance.

**Failure to provide two eligible referees** may **result in disqualification**

|  |  |  |
| --- | --- | --- |
| **Reference information** | **Referee 1** | **Referee 2** |
| Customer Organisation: |  |  |
| Customer contact name: |  |  |
| e-mail: |  |  |
| phone number: |  |  |
| Date contract awarded: |  |  |
| Contract reference and brief description: |  |  |
| Total contract value in GBP(£): |  |  |
| Contract length in years: |  |  |

Scored as a pass/fail. If you are unable to provide satisfactory referees or certificates of performance we will not take your application further.

## Economic and financial standing

The information provided will be used to assess your Organisation’s financial standing.

**Our minimum standards for economic and financial standing are that:**

* Applicants comply with regulatory requirements relating to the filing of statutory accounts
* Applicants’ statutory accounts (if any) have received a ‘clean’ audit opinion or, where the audit opinion is qualified, suitable, appropriate and timely action has been taken to deal with the issues raised;
* The financial aspects of Applicants’ organisations (including but not limited to the payment of creditors) are properly managed;
* Applicants’ organisations are financially sustainable, including adequate liquidity, profitability, balance sheet strength and cash flow.

**Checks and review:**

1. We will first check that your statutory accounts (where you are required to file them) have been filed on time. If they are overdue, we will seek an explanation from you and, if no acceptable explanation is forthcoming, we will not take your application further.
2. We will make checks with a credit rating agency and, if there are any adverse reports (such as High Court writs, County Court Judgements, or qualifications to your auditor’s report) we will seek an explanation from you. If no acceptable explanation is forthcoming, we will not take your application further.
3. Subject to (1) and (2) above we will review the information provided and publicly available information and will consider whether there are “warning signals” which, taken together, indicate significant cause for concern about your financial stability. These may include:
4. falling cash levels
5. falling profit margins
6. increasing overdraft with static turnover
7. major reductions in staffing
8. increasing employment with static turnover
9. increasing debtor and creditor days
10. larger increases in creditors than debtors
11. deteriorating liquidity
12. over-reliance on short term debt
13. high gearing
14. unsatisfactory results of ratio analysis
15. increasing pension liabilities
16. heavy write-offs of foreign or subsidiary holdings
17. late filing of accounts
18. qualified accounts
19. profit warnings
20. County Court Judgements (CCJs)
21. poor credit ratings
22. unusual accounting policies
23. changing auditors and bankers
24. debt rating downgrades/alerts
25. concerns raised by investment bank prospect reports
26. adverse press reports.

We may seek further information or explanation from you about any such matter.

**Information required:**

The following financial information is required to be provided and an assessment will be undertaken to produce a summary profile of your organisation's financial condition and that of its ultimate parent (if applicable).

If you have changed your legal identity during the last two years, please provide accounts for both old and new identities.

A qualitative assessment will be used to identify the level of risk presented by your organisation the results of which will be categorised either as a Low Risk, Medium Risk or High Risk.

The Council may seek further information from any Applicant about their economic and financial standing during the evaluation.

The Council may also ask any Applicant whether it is willing to offer a financial guarantee (such as a parent company guarantee or ultimate holding company guarantee) and/or a performance bond and/or any similar instrument and may take into account the comfort offered by these instruments in its assessment of whether financial risk is ‘high’.

**In order to meet minimum standards your organisation must be categorised as either a 'low' or 'medium' risk. Applicants categorised as a 'high' risk will be eliminated and their application will not be taken further.**

1. Please provide a copy of the audited accounts at i for the most recent two years. If this is not available please provide one or more of ii, iii or iv to demonstrate your economic/ financial standing. Please indicate which items you have attached to your bid by ticking “yes” or “no” in the relevant box.
2. A copy of the audited accounts for the most recent two years.

Yes

No

1. A statement of the turnover, profit and loss account, current liabilities and assets, and cash flow for the most recent year of trading for this organisation.

Yes

No

1. A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position.

Yes

No

1. Alternative means of demonstrating financial status if any of the above are not available (e.g. forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status).

Yes

No

1. Have you complied with regulatory requirements relating to the filing of statutory accounts, including filing accounts on time?

Yes

No

**If you have answered “no”, please provide an explanation below**

1. Where the Council has specified a minimum level of economic and financial standing and/or a minimum financial threshold within the evaluation criteria for the **Conditions of Participation,** please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out here.

Yes

No

**If you have answered “no”, please provide an explanation below**

1. Where the audited accounts (if any) provided do not cover the most recent full financial year (or part financial year if you have been trading for less than one financial year), please provide a statement of your turnover, profit & loss and cash flow for that financial year (or part year if full year not applicable) and an end period Balance Sheet, or a draft set of accounts.
2. Where a Consortium or Association is proposed, the information is requested for each member company.

**Evaluation**

For each candidate we will prepare an analysis stating a summary score, from 1 to 3, as follows

1 – High risk Unacceptable financial risk

2 – Medium risk Some concerns but acceptable

3 – Low risk No material concerns

and a summary justification for the score given, reflecting reasoned professional judgment, where an Applicant receives a score of 1.

Parent Companies will not be reviewed unless a company fails its initial assessment.

We will eliminate Applicants who score 1.

## Modern Slavery Act

If you have an annual turnover of at least £36 million and are a relevant commercial organisation as defined in the Modern Slavery Act 2015, please confirm that you have published a statement and that you meet the requirements of Section 54 and any guidance issued under Section 54 of the Modern Slavery Act 2015.

Yes

No

N/A – our turnover is less than £36 million and we are not a relevant commercial organisation as defined in the Modern Slavery Act 2015.

If you cannot answer yes to this question where you have an annual turnover of at least £36 million and are a relevant commercial organisation as defined in the Modern Slavery Act 2015, your tender will be rejected.

## Health and Safety

The Council needs to be confident that Applicants have a good track record of managing Health and Safety both for their own organisation and the public, and organisations should be able to demonstrate they have previous experience in undertaking the type of work involved safely. In order to demonstrate this please answer the following questions.

The Council reserves the right to seek further information from any Applicant to support the statements provided below, including but not limited to requesting copies of relevant policies and procedures, method statements and copies of risk assessments for this type of work, and verifying that any stated sub-contractors meet the same standard.

**The criteria at the end of this Form C will be used to evaluate the responses to each of the questions in this section. If you do not pass this part of the evaluation, your** request to participate will be rejected.

* Please limit each response to the page length stated
* **The responses to these questions will be evaluated by Norfolk County Council's Health and Safety team.**

1. In relation to your business, please give details of any pending or completed prosecutions and prohibition or improvement notices served by the HSE, EHO or Fire Service and actions taken as a result, over the past three years.

A number of significant incidents will not automatically preclude an organisation from the process, unless the evidence provided about the actions taken is unsatisfactory, or there are enforcement actions for the same type of deficiency.

**Answer below** (A guide of 1 page of A4)

1. In relation to your business, please provide the following information for the last three years:

* The number of incidents reported under the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR)
* A summary of incident details, investigation findings and actions identified to prevent recurrence.

Confirmation that all actions have been implemented

**Answer below** (A guide of 2 pages of A4)

1. Health and Safety (pass/fail)

Please provide details of health and safety responsibilities and organisation arrangements relating to the proposed service.

We are looking for information that confirms that essential safety management arrangements will be in place. Your response should include:

* Who will have senior management responsibility
* Who will provide you with competent health and safety advice
* What health and safety training you will provide, relevant to the service
* How health and safety will be monitored and reviewed

If subcontractors are to be used for this work, please give details of how you will select and monitor them. If no work is to be subcontracted, please state Not Applicable.

**Answer below** (A guide of 2 pages of A4)



Please provide a health and safety risk assessment or a written explanation of the significant hazards present in your business and the control measures that you employ.

We are looking for information that confirms that a suitable approach to controlling significant risks is in place.

You should answer these questions with suitable input, if needed, from your company or organisation’s health and safety adviser. Your response should include:

* What you regard as the significant hazards associated with your business
* Who you think could be harmed by those hazards
* What you do to control the risks

Answer below (A guide of 2 pages of A4)

|  |  |
| --- | --- |
| Descriptor FOR THE ALLOCATION OF PASS/FAIL scores | Mark awarded |
| The application shows one or more of the following features appropriate to the question:   * Applicant has not provided a response * Applicant provides a response of such a poor standard as to provide no confidence that the Applicant could meet the requirements * Applicant provides no evidence that their experience and/or expertise is relevant to this contract * The Applicant has demonstrated poor industry practice in their response * The Applicant does not hold the required qualification(s), registration(s) or licence(s) in order to perform the contract and will not do so by contract commencement * Supporting documents (where requested) are of insufficient quality, depth or relevance to provide any confidence that the Applicant could meet the requirement. | Fail |
| The application shows, relevant to the appropriate question, that:   * The Applicant has the required experience and/or expertise to provide the service and provides some confidence that they would be able to perform the contract * The Applicant has demonstrated that they have the capability to perform the contract * The Applicant has demonstrated that they hold the required qualification(s), registration(s) or licence(s) in order to perform the contract or that they will do so by contract commencement * The Applicant has demonstrated good industry practice in their response * The supporting documents (where requested) are of good quality, relevant and of sufficient depth and demonstrate that the Applicant could meet the requirement. | Pass |

Form D: Willingness and ability to comply with contractual requirements

* Applicants are to reproduce this Form D, retaining the question text and question numbering, and upload it as part of their submission. Applicants are to answer all questions.
* Applicants must edit the header of this section to insert their name at the top of every page of the forms so that it is clear to evaluators whose bid is whose.
* **Please do not append any documents unless specifically requested below.**

D1. Conditions of contract

The following questions are marked as pass/fail, where “yes” is a pass, and “no” is a fail.

1. **Terms and conditions**

We are willing to enter into the contract in accordance with the specified terms and conditions, without modification.

Yes

No

1. **Insurance**

Please provide details of your organisation’s insurances.

|  |  |  |
| --- | --- | --- |
| Specific minimum insurances | We already hold this insurance (state insurer, policy number, extent of cover and expiry date below) | *Or* We are willing and able to obtain and maintain this insurance if awarded the contract (answer yes below) |

|  |  |  |
| --- | --- | --- |
| Employer’s liability to £10,000,000 |  |  |

|  |  |  |
| --- | --- | --- |
| Public liability to £10,000,000 in respect of any one claim; no annual or total cap |  |  |

|  |  |  |
| --- | --- | --- |
| Professional Indemnity to £2,000,000 in respect of any one claim; no annual or total cap |  |  |

Scored on a pass/fail basis: If you do not currently hold and are unwilling or unable to obtain the minimum levels of insurance, your application will be rejected and you will not be invited to tender.

Form E: Shortlisting Questions

FORM E NOT USED IN THIS PROCUREMENT

Form F: Quality Questions

* Applicants are to reproduce this Form F retaining the questions and numbering and return it as part of their tender submission. Applicants must answer all questions.
* Applicants must edit the header of this section to insert their name at the top of every page of the forms so that it is clear to evaluators whose bid is whose.
* Applicants’ responses must be clearly legible (Arial) and in at least 12-point type, on a line spacing of at least 1.2 times the type size.
* The answer to each question must be self-contained. Responses such as ‘see answer to question x’ are not acceptable.
* You should not assume that the evaluators have any prior knowledge of your organisation, its capabilities or the solutions your organisation offers and you should ensure your responses to each question presume the evaluators know nothing of your organisation, and where relevant your subcontractors, consortium members or partners if you are heavily reliant on a third party in a bid.
* **Please do not append any documents unless specifically requested below.**
* Ensure that your answers are succinct and do not drift over the word/page count guide unnecessarily. If the word/page count is causing you significant issues with answering a question thoroughly, please raise this as a clarification. Please note that if you grossly breach the word/page count guide anything over that guide is likely to be disregarded.
* Please ensure all answers are fully referenced to the relevant question.

### AI and Machine Learning (not scored)

Are AI or machine learning technologies used as part of the products or services you intend to provide?

Yes

No

If “Yes”, please describe how AI technologies are integrated into your service offerings below, and ensure that they are fully described in your responses to the weighted questions.

**Please use ANNEX 4 FORM F for your bid response template.**

**Please see below a copy of the ITT Questions for completeness here.**

|  |
| --- |
| **F1**  Describe your approach to the planned maintenance and inspection of split, multi-split, VRF/VRV, and ducted air conditioning systems, including F-Gas refrigerant systems.  Include in your response, how do you ensure compliance with manufactures maintenance requirements and SOP016 and SOP015, and how do you manage certification and reporting across a geographically and diverse estate of over 200 properties.  15% 2 x A4 pages, 12 pt Arial |
| **F2** Explain your procedures for inspecting and maintaining Local Exhaust Ventilation (LEV) systems and HVAC air handling units, including filter replacement and grille cleaning. How do you ensure traceability of filter inspections and justify when LEV cleaning is not required, in line with SOP015 and HSE guidance.  10% 1.5 x A4 pages, 12pt Arial |
| **F3**  What systems do you have in place to ensure that only appropriately qualified and competent engineers carry out servicing on air conditioning systems, including those using refrigerants and chilled water and how do you manage training records and match engineer qualifications to specific asset types and SOP requirements?  In your response, please demonstrate how your engineers are appropriately trained by manufacturers and possess the necessary qualifications and seniority to competently service a wide range of air conditioning systems (e.g., Daikin, Mitsubishi, Samsung), excluding F-Gas-related requirements?  15% 2 x A4 pages, 12 pt Arial |
| **F4** Given the scale and geographical spread of the NCC estate and the requirement for planned maintenance and remedial works at 3-, 6-, and 12-month intervals, describe how your organisation is structured to deliver this service. How will you allocate resources to ensure timely delivery across over 200 properties, and how will you provide responsive out-of-hours support in line with contract requirements?  10% 1.5 x A4 pages, 12pt Arial |

Form Z: Applicant's declaration

* Applicants are to complete this form and attach it as part of their submission as either a Word document or pdf. Applicants are to answer all questions.
* Please read the declaration carefully before signing it.
* Applicants may either print this Form Z on plain white A4 paper, sign and date it with a pen, scan and then upload it as the final part of their submission or use an electronic signature.
* Applicants are to edit the header of this section to insert their organisation’s name at the top of every page of the forms.

## Z.1 Checklist

Check each issue below and tick each box.

|  |  |
| --- | --- |
| We confirm that: | Tick |
| We are registered on the Government’s Central Digital Platform, Find a Tender Service |  |
| We do not appear on the Government’s debarment list |  |
| Any subcontractors we are relying on do not appear on the Government’s debarment list |  |

|  |  |
| --- | --- |
| We have completed the following forms: | Tick |
| * Form A (as the cover sheet to our submission) |  |
| * For VAT Registered Organisations provide a copy of your VAT certificate |  |

|  |  |
| --- | --- |
| * Form B |  |
| * Form C including references or certificates of performance, plus supporting financial information |  |
| * Form D |  |
| * Annex 3 Form G Pricing Spreadsheet |  |
| * Annex 4 Form F Quality Questions Template |  |
| * This Form Z |  |

|  |  |
| --- | --- |
| We have: | Tick |
| Amended the header on each form to insert our organisation’s name. |  |
| Included all required documents and information, without omission. |  |
| Made arrangements for the tender to be uploaded and submitted on time, with adequate contingency for ICT failures, power outages etc. |  |

|  |  |
| --- | --- |
| We have not: | Tick |
| Used a smaller typeface or line spacing than that permitted. |  |
| Annexed any document not specifically requested. |  |