

**INVITATION TO
TENDER**

**PROVISION OF
INTERNAL AUDIT
SERVICES**



NOVEMBER 2025

Tenders must be received at the Advance's Head Office no later than 18th December 2025

Document A

Table of Contents



		Page
01	INVITATION TO TENDER Request for Tender details	01
02	ABOUT ADVANCE Our Vision	02
03	CONTRACT OVERVIEW 3.2 Duration	04
04	PROCUREMENT PROCESS 4.1 Procurement Timeline	04
05	SUBMISSION FORMAT Format for submissions	05
06	TENDER EVALUATION 6.1 Evaluation Process	05
07	SCORING METHODOLOGY 7.1 Quality Evaluation 7.2 Price Evaluation 7.3 Interview	06
08	CONTRACT AWARD 8.1 Conclusion Notification	07
09	OTHER INFORMATION 9.1 Conditions of Participation	07



1. INVITATION TO TENDER: INTERNAL AUDIT SERVICES

Dear Interested Parties,

You are formally invited to submit a tender for the provision of internal audit services to Advance.

Respondents must follow the instructions outlined in Section 5 of this document when preparing their submission. Additionally, they should refer to Document B to ensure full compliance with the requirements.

Please ensure your completed tender is received by 1:00 PM on 18th December 2025.

If you require clarification regarding any aspect of this invitation or the tender process, please contact:

Kayleigh Sterland-Smith
Executive Director of Finance
Advance
2 Witan Way Witney
Oxfordshire OX28 6FH

Email: kayleigh.sterland-smith@advanceuk.org

All queries must be submitted no later than 11th December 2025 – 7 days prior to 18th December 2025 to allow sufficient time for responses. Please note that any questions and corresponding answers may be shared with all tenderers to ensure transparency and fairness.

We look forward to receiving your submission.

Yours sincerely,

Kayleigh Sterland-Smith

Executive Director of Finance & Technology





2. About Advance

Advance is a charitable organisation and a Registered Provider of Social Housing, regulated by the Regulator of Social Housing. As of 2025, we deliver housing, support, and employment services to over 3,000 individuals across England.

We work with more than 156 local authorities in England and employ approximately 883 staff. Our latest audited turnover exceeded £52.3 million, comprising:

- £26.6 million from social housing lettings
- £20 million from support contracts
- £5.7million from other income streams

Our head office is located in Witney, with principal offices in Leicester and London.

We own and/or manage properties for over 1,600 people with disabilities (including learning disabilities) and mental health conditions. Our portfolio includes:

- CQC-monitored residential accommodation
- Self-contained apartments
- Shared ownership properties under the HOLD scheme

Advance provides comprehensive landlord, maintenance, and housing management services, including services to third-party organisations.

We currently support around 1952 individuals through a range of services, including:

- Community-based support
- Residential care
- Intensive support for complex needs
- Domiciliary care and supported living
- Outreach services
- Support for those with personal budgets and personal health budgets

Our vision



Our vision is to transform the lives of people with a disability or mental health condition by providing the best quality housing and support services. We want to enable our customers to live the lives they choose, achieve their personal goals, feel valued and know their voices are heard.



Everything we do is guided by our PRIDE values.

They form the basis of the way we work together to support our customers.



Partnership – we work in partnership with our customers and build better relationships with others that help us serve our customers better

Respect – we treat our customers, colleagues and others as we would like to be treated

Inclusion – we work to create an environment where diversity is celebrated and where everyone can thrive

Drive – we do the right thing at the right time and everything we do is driven by our customers' needs

Efficiency – we make good use of resources, find innovative ways to do things and maximise efficiency to deliver the best services for our customers

PRIDE

Partnership

Respect

Inclusion

Drive

Efficiency

3. Contract overview

Internal audit services are currently provided to Advance by RSM. The existing contract term is due to expire at the end of March 2026.

Advance is seeking proposals from suitably qualified firms to be the Internal Auditors for the Association.

The service contract will commence on 1 April 2026. Advance reserves the right to accept any proposal, regardless of price, or to reject all proposals.

3.2 Duration

The Board is seeking to retender these services for a period of:

- (i) at least three years with an option to extend for up to a further 2 years.
- (ii) options for a longer period of up to 5 years but with no extension will be considered if they represent value for money for the organisation.

4. Procurement Process

Respondents are required to review all documents included in this pack and must complete Documents C and D, along with the requested supporting documentation, as part of their submission. Submissions will be evaluated in accordance with Section 6 and 7 of this document.

Following the evaluation of tender responses, Advance may issue clarification requests. Any clarifications provided by respondents will be assessed at the time of submission and factored into the overall evaluation. Please note that response deadlines for clarifications may be short, but timely replies will be essential.

4.1 Procurement Timeline

The following timeline outlines key milestones in the procurement process:

Activity	Date
Invitation to Tender Issued	12 November 2025
Deadline for Clarification Questions	11 December 2025
Tender Submission Deadline	18 December 2025
Evaluation and Shortlisting	19–22 December 2025
Interviews and Presentations	w/c 5 January 2026
Notification of Intent to Award	26 February 2026
Contract Start Date	1 April 2026

Advance reserves the right to amend these dates if necessary.

5. Submission Format

Proposals must be submitted either by email to kayleigh.sterland-smith@advanceuk.org or by post in a sealed envelope marked only with: "Tender – Advance Internal Auditors". No identifying marks should be present.

Submissions should:

- Be no longer than 30 pages
- Be made using Document C for the quality evaluation and Document D for the price evaluation.
- Be received by the deadline 18th December 2025.

Submissions after the deadline will not be accepted.

6. Tender Evaluation

6.1 Evaluation Process

Submissions will be evaluated based on the Most Economically Advantageous Tender (MEAT), balancing quality, cost, and overall value to Advance. The evaluation will follow a structured, two-stage process:

Stage 1: Initial Screening Assessment

All submitted tenders will undergo an initial screening to ensure that:

- The tender has been submitted on time, is correctly completed, and materially complies with the requirements set out in the Invitation to Tender.
- The submission is sufficiently complete to allow evaluation in line with the published criteria.
- The bidder has adhered to the rules and procedures outlined in the Invitation to Tender.

Incomplete or non-compliant tenders may be excluded from further consideration at this stage.

Stage 2: Quality, Price Evaluation, and Presentations

Tenders that pass the initial screening will proceed to a detailed evaluation in accordance with the criteria and weightings set out in the below table.

- Price (40%)
- Quality of service (60%)

Criteria	Sub Criteria	Weighting
Quality	1. Organisation Experience	10%
	2. Proposal	20%
	3. Contract Implementation	10%
	4. Contract Management	10%
	5. Social Value	5%
	6. Business Continuity	5%
	Subtotal	60%
Price		40%
Total		100%

Advance reserves the right to amend these if necessary.

7. Scoring Methodology

7.1 Quality Evaluation

Respondents must complete Document C to address the quality element of the tender. Document C is divided into Part A and Part B, both of which are mandatory. Each quality criterion outlined in Part B will be scored on a scale of 0 to 5, as follows:

Score	Judgement	Description
5	Excellent	Fully meets all requirements with outstanding added value.
4	Very Good	Meets most requirements with minor omissions.
3	Good	Meets basic requirements with some limitations.
2	Adequate	Partially meets requirements; improvement needed.
1	Poor	Fails to meet key requirements.
0	No Response	No answer or wholly inadequate response.

7.2 Price Evaluation

Respondents are required to complete Document D to provide their pricing information as part of the tender process. The pricing evaluation will be based on a cost modelling approach, with a total weighting of 40% allocated to this element.

The respondent submitting the lowest modelled cost will receive the maximum score of 40. All other submissions will be scored proportionally using the following formula:

$$\text{Price score} = (\text{lowest submitted cost} \div \text{submitted cost}) \times 40$$

Advance reserves the right to amend these if necessary or to disqualify any price it considers to be unrealistically low and/or unsustainable.

7.3 Interview

The three highest-scoring firms will be invited to attend an in-person interview during the week commencing 5 January 2026 at Advance's Head Office:
2 Witan Way, Witney, Oxfordshire, OX28 6FH.

Shortlisted bidders will be required to deliver a 15-minute presentation based on a theme provided at the time of shortlisting. This will be followed by a 30-minute question-and-answer session with a panel comprising members of Advance's Board and senior officers.

Presentations must be clearly aligned with the bidder's written submission and address the published evaluation criteria. The interview will serve to clarify and moderate the initial desktop assessment. Evaluation scores may be revised based on the outcomes of the interview, in accordance with our moderation framework.

8. Contract Award

8.1 Conclusion Notification

Upon completion of the evaluation process, all scores will be ranked accordingly. Subject to the successful completion of reference checks, financial assessments, and any other due diligence deemed appropriate by Advance, the contract will be provisionally awarded to the highest-ranking bidder. All tenderers will be formally notified of the award decision in writing. Following the conclusion of the standstill period, Advance intends to enter into contract with the successful bidder. Where applicable, an award notice will also be published in accordance with procurement regulations.

9. Other Information

9.1 Disclaimer and Conditions of Participation

Bidders are responsible for obtaining all necessary information to prepare their tender submissions.

While Advance will make reasonable efforts to ensure the accuracy of information provided, it accepts no liability for any loss or damage resulting from its use.

Please note:

- This Invitation to Tender does not constitute a binding offer.
- All costs and expenses incurred in connection with the preparation and submission of a tender are the sole responsibility of the bidder.
- Advance reserves the right to discontinue this procurement process at any stage without awarding a contract and will notify bidders accordingly.
- No legal commitment shall exist between Advance and any bidder until a formal contract has been agreed and signed by all relevant parties.
- Advance is not obliged to accept any tender submission, in whole or in part, and reserves the right to accept or reject any proposal at its sole discretion.