



**TENDER FOR
CUSTOMER ENGAGEMENT AND SELF-SERVE PLATFORM**

TENDER DOCUMENT ONE

INFORMATION AND INSTRUCTIONS

To assist you, four documents have been provided:

- Document One – Information and instructions (this document)
- Document Two –Specification
- Document Three –Draft Terms and Conditions
- Document Four – Tender Response Document

When completed, please return **one copy electronically** of the response document (Document Four) via <https://www.eastmidstenders.org>. Please ensure the file size of each document you submit does NOT exceed 10mb

To be received no later than 12 noon on 17th May 2019.

Late submissions will be disregarded.

TENDER – DOCUMENT ONE
INFORMATION AND INSTRUCTIONS

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1. Introduction

1.1 How this tender is structured

This tender is arranged in four sections:

Document One, this document, contains instructions on how to respond to the Invitation to Tender; gives an indication of the timetable being followed; provides bidders with details of the scoring, criteria and weightings which will be used to evaluate bids, and details of how and when to return the Tender Response Document (Document Four).

Document Two contains the detailed Specification for the goods or services required.

Document Three contains the Terms and Conditions which apply to this tender and to the ensuing contract.

Document Four is the Tender Response Document which has to be completed according to the instructions and returned as instructed by no later than the due date and time.

1.2 The commissioning background

1. This contract is issued by Melton Borough Council (the Council).
2. In compliance with the Public Contract Regulations 2015, a single stage tender process is being followed.
3. This means that the tender response document combines Selection Questions, a set of Tender Evaluation Questions, Pricing Schedule, a Form of Tender, a Collusive Tendering Certificate and a Confidential and Commercially Sensitive Information form.
4. The Council, as the contract holder, requires that the process of awarding this contract is to involve the circulation of the tender documentation to locally known suppliers who may have the right experience, and advertising on Contracts Finder.
5. The eventual contract between the successful tenderer and the Council will consist of the following documents:
 - a. Documents 1 to 3 of this tender developed by the Council.
 - b. Document 4 of this tender – the response document completed by the Bidder.
 - c. 'Letter of Acceptance' confirming the conditions of acceptance of the tender.
6. The Council currently uses the Northgate Front Office CRM system. This system is no longer supported by Northgate Public Services. Residents are currently able to self-serve a number of interactions with the Council using the Agilysis My

Account system. This contract ends in March 2020. These factors along with a recent structural re-organisation provided an opportunity to review processes and how they are supported by IT solutions and in particular those processes and systems supporting our customer service functions

1.3 Procurement Timetable

1.3.1 The procurement is intended to follow the time-line below:

1	Tender documents Issued	15 th April 2019
2	Deadline for clarification questions	24 th April 2019
3	Deadline for Submission of Tenders	17 th May 2019
4	Evaluation	31 st May 2019
5	Clarification meetings/Reference Site Visits (if required)	14 th June 2019
6	Standstill Period	2 nd – 12 th July 2019
7	Contract Awarded	15 th July 2019
8	Contract Start	1 st August 2019

1.3.2 The Council reserves the right to amend this timetable and steps 4 to 8 are provided for indicative purposes only.

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1.4 Instructions on responding to this tender

1. Bidders shall treat the details of the tender document as private and confidential. However such information may be disclosed, as necessary, for the purpose of obtaining quotations, e.g. insurance quotes.
2. All costs associated with the preparation and submission of the response to this Invitation to Tender shall be borne in full by the Bidders. The Council will not be liable, under any circumstances, for any costs or charges incurred in submitting a tender or for the preparation of the Contract with the successful Bidder.
3. The Form of Tender, the Collusive Tendering Certificate and the Confidential and Commercially Sensitive Information form in Document Four must be completed and signed by the Bidder. The whole document (Document Four) should be returned via <https://www.eastmidstenders.org>.
4. Any recommendations, reservations or comments pertaining to the information included in the Invitation to Tender documents should be clearly stated.
5. No unauthorised alterations or additions should be made to the Form of Tender, Collusive Tendering Certificate, the Confidential and Commercially Sensitive Information form or to any other part of Document Four.
6. Tenders must not be qualified but must be submitted strictly in accordance with the tender documents.
7. Bidders may submit (an) alternative bid(s); but must also submit a conforming bid.
8. The tender submission should include all the information which the Bidder feels necessary for an accurate and equitable evaluation of their proposal. Reference should not be made to previously submitted information and all aspects of the tender requirement are to be addressed. The submission is to be self contained. The Bidder should not rely on the Council's past experience as tender evaluations will be based only on the information contained within the submission.
9. Bidders will not be allowed to alter their tenders after the closing date, except that arithmetical errors may be corrected.
10. Any queries arising from the tender documents which may have a bearing on the offer to be made should be raised as soon as possible via <https://www.eastmidstenders.org> and in any case by the stated deadline for questions.
11. Tenders and supporting documents must be written in English.
12. Bidders should note that the tender document may include a requirement for element(s) of the goods or services to be completed by a certain date as shown.

13. Tenders should be submitted no later than the deadline indicated on the front of this document. Late tenders will not be considered. Fax and email submissions will not be considered even if received before the date indicated.
14. Bidders must hold their tender open for acceptance for a minimum of ninety (90) days from the date of opening.
15. The Council does not bind itself to accept the lowest or any tender.

2. PROCUREMENT APPROACH

1. This is a single stage/open tender process, this being the Invitation to Tender. You may ask questions in writing via <https://www.eastmidstenders.org> regarding the tender documents or the details of the goods or service required.
2. Where questions raise an issue of general interest or clarification then the question and answer will be circulated to all Bidders. The identity of the originator will not be disclosed.
3. Once the deadline for receipt of tenders has been reached, the Council will evaluate the written tenders. The standard Selection Questions will be assessed first, as Bidders who do not meet the Council's expectations may be excluded. Suppliers who self certify that they meet the requirements for insurance, economic and financial standing, and technical and professional ability will be required to provide evidence of this if they are successful at contract award stage.
4. The responses to the evaluation questions will then be scored and weighted as explained in [Sections 3](#) , [4](#) and [5](#) below.
5. Once the submitted bids have been evaluated, the Council reserves the right to hold clarification meetings or make reference site visits with no fewer than the top two highest scoring bidders. No new criteria will be introduced at these interviews/visits, rather on the basis of these interviews/visits the Council may choose to revise a bidder's score for each response to an evaluation question, either up or down, to reach a final score.
6. Should the evaluation panel, in its reasonable judgement, identify a fundamental failing or weakness in any tender then that tender may, regardless of its other merits, be excluded from further consideration.
7. The Council will then make its award decision, if appropriate.
8. The procurement timetable is detailed in section 1.3 above, and the tender evaluation process is shown below.
9. The process is subject to the completion of formal contract documents.

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3 SCORING

3.1 Non-Price Scoring

Each written tender will be evaluated by a small panel and each evaluation criteria (Section 5 below) will be awarded points out of 10 according to the following scale.

Score	Criteria for awarding score
0	No response or response is unacceptable
1	Response is very weak and almost unacceptable, and/or is inconsistent or in conflict with other responses
2	Response is weak, and falls well below expectations in a number of respects
3	Response is weak and is below expectations, not meeting the required standard in most respects, and/or is lacking/ inconsistent in others
4	Response is below expectations but meets the required standard in some respects
5	Response meets expectations regarding the required standard
6	Response slightly exceeds expectations regarding the required standard
7	Response is good and is well above expectations in some respects
8	Response is very good and is well above expectations in most respects
9	Response is outstanding and meets the required standard in all respects and exceeds some or all of the major requirements
10	Response is exceptional and meets the required standard in all material respects and exceeds all the major requirements, and represents significant added value

The weighting available for a score of 10 points is shown below in Section 5, and a pro rata weighting will be applied to the score.

3.2 Price Scoring

The total price figure will be converted into points by applying the formula:

Lowest price bid divided by tenderer's price multiplied by 100%

For example, if the tenderer's price is £100, and this is also the lowest price, the calculation is $\frac{100}{100} \times 100\% = 100\%$ of the available weighting

A bid of £200 would be calculated as $\frac{100}{200} \times 100\% = 50\%$ of the available weighting.

4 CRITERIA FOR ASSESSING STANDARD SELECTION QUESTIONNAIRE

The Public Contract Regulations 2015 came into force on 26th February 2015.

Local authorities may assess a Bidder's suitability to deliver the requirements as stated in the Specification/Contract. Those bidders who satisfy that selection assessment will have their tenders evaluated. Those who do not may be excluded from the process.

Question No.	Section Headings and Sub-Headings	Maximum Available Section Score	Weighting Within Sub-Heading
1.1 1.1 (a) 1.1 (b) (i) 1.1 (b) (ii) 1.1 (c) 1.1 (d) 1.1 (e) 1.1 (f) 1.1 (g) 1.1 (h) 1.1 (i) (i) 1.1 (i) (ii) 1.1 (j) (i) 1.1 (j) (ii) 1.1 (k) 1.1 (m) 1.1 (n) 1.1 (o) 1.1 (p)	Potential Supplier Information Full name Registered office Registered website address Trading status Date of registration Company registration number Charity registration number Head Office DUNS number Registered VAT number Appropriate professional/trade registration If yes, details Legal required for professional/trade registration If yes, details Relevant classifications SME Persons of Significant Control Details of immediate parent company Details of ultimate parent company	0%	0%
1.2 1.2 (a) (i) 1.2 (a) (ii) 1.3 (a) (iii) 1.2 (b) (i) 1.2 (b) (ii)	Bidding Model Bidding as lead contact for a group of economic operators Name of group of economic operators Proposed legal structure Use of sub contractors Sub Contractor details	0%	0%
1.3 1.3 (a)-(h)	Contact Details and Declaration Details completed	0%	0%
2 2.1 (a)	Grounds for Mandatory Exclusion Regulations 57(1) and (2): Criminal organisation Corruption Fraud Terrorist offences Money laundering Child labour/human trafficking Breach of environmental obligations	Pass/Fail	Pass/Fail

Question No.	Section Headings and Sub-Headings	Maximum Available Section Score	Weighting Within Sub-Heading
2.1 (b)	Breach of social obligations Breach of labour obligations Bankrupt/insolvency or winding-up proceedings Grave professional misconduct Agreements with other economic operators to distort competition Conflict of interest Preparation of procurement procedure Early termination of contract /damages/comparable sanctions In breach of obligations re: tax/social security contributions Measures taken		
2.2	Self cleaning measures	Pass/Fail	Pass/Fail
2.3 (a) 2.3 (b)	Breach of tax/social security obligations If yes, further details	Pass/Fail	Pass/Fail
3 3.1 (a) 3.1 (b) 3.1 (c) 3.1 (d) 3.1 (e) 3.1 (f) 3.1 (g) 3.1 (h) 3.1 (i) 3.1 (j) 3.2	Grounds for Discretionary Exclusion Regulation 57 (8) Breach of environmental obligations Breach of social obligations Breach of labour obligations Financial administration Guilty of grave professional misconduct Distorting competition Conflict of interest Involved in preparation of procurement Significant or persistent deficiencies Statement response If yes, self cleaning	Pass/Fail	Pass/Fail
Question No.	Section Headings and Sub-Headings	Maximum Available Section Score	Weighting Within Sub-Heading
4 and 5 4.1 4.2 5.1 5.2 5.3	Economic and Financial Standing Audited accounts or alternative means of demonstrating financial status Minimal financial threshold Parent company accounts Parent company guarantee Bank guarantee	Pass/Fail	Pass/Fail
6 6.1 6.2	Technical and Professional Ability Details of up to three contracts Evidence of healthy supply chains maintained with sub-contractors Sub contract supply chain management	Pass/Fail	Pass/Fail
7 7.1	Requirements under Modern Slavery Act 2015 Relevant commercial organisation	Pass/Fail	Pass/Fail

Question No.	Section Headings and Sub-Headings	Maximum Available Section Score	Weighting Within Sub-Heading
7.2	Compliant with annual reporting requirements		
8	Additional Questions:		
8.1	Insurance	Pass / Fail	Pass/Fail
8.2 (a) (b) (c) (d) (e) (f) (g) (h) (i) (j) (k)	Health and Safety Formal health and safety policy/statement Accredited health and safety system Responsible person for health and safety policy Health and safety professional/consultant Health and safety training (staff/sub-contractors)? Accident records Staff consultation on health and safety matters Risk assessments Investigated / prosecuted for health and safety offence Civil action for health and safety offence Prohibition / improvement notices for breaches of health and safety legislation	Pass/Fail	Pass/Fail
8.3 (a)	Environmental Management Policy re: safe management of the environment	Pass/Fail	Pass/Fail
8.4 (a) (b) (c) (d) (e)	Equal Opportunities Compliant policy Findings of unlawful discrimination / harassment Investigated by the Equality and Human Rights Commission Complaints procedure Equality awards	Pass/Fail	Pass/Fail
8.5 (a) (b)	GDPR Human and technical resources Technical facilities and measures	Pass/Fail	Pass/Fai
8.6	Essential Criteria	Pass/Fail	Pass/Fail
8.7	E Government Standards	Pass/Fail	Pass/Fail

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5 CRITERIA FOR ASSESSING TENDER RESPONSES

Only those Bidders which pass the Selection Questions will have their tenders evaluated using this scheme.

Section Headings and Sub-Headings	Maximum Score Available	Weighting Within Sub-Heading
Quality Question 1: Delivery of essential and desirable elements and their impact Question 2: Improved service delivery Question 3: Configuration and implementation Question 4: Risk management Question 5: Sharing best practice Question 6: Feedback Question 7: ICT Partnership Question 8: KPI Information	65%	10% 10% 12% 10% 8% 8% 5% 2%
* Price (exclusive of VAT) The total price for the initial 5 year term of the Contract (essential criteria including inescapable desirable criteria that form part of the core package)	35%	35%
Total	100%	

* Please note that the lowest cost tender will receive the highest mark in the Price sub-heading, all other tenders will receive a pro rata score based on that lowest price (See: 3.2 Price Scoring).

6. INVITATION TO TENDER

When completed, please return **one copy electronically** of the response document (Document Four) via: <https://www.eastmidstenders.org>

To arrive by **no later than 12 noon on 17th May 2019**

7. CONTACT

In the event of any queries or requests for further information arising from this tender, please make contact via: <https://www.eastmidstenders.org>

Note that the Council cannot accept the return of completed tender responses by e-mail or post.

If the Council considers any question or request for clarification to be of material significance, both the query and the response will be communicated, in a suitably anonymous form, to all service providers / suppliers who have responded.

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