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**Invitation To Tender Foundation Questions**

**MVH25002 - Heating Servicing, Repair and Installation**

**Return Deadline:**

04 July 2025 – 12:00pm (Noon)

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# Section A – Organisation Details

Please note: **All Tenderers are required to complete this section.**

**Section A is for information only and will not be scored.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Question No** | **Description** | **Answer** | |
| **A – 1.1** | **Full Name of Organisation** (or of the organisation acting as lead contact where a consortium bid is being submitted) |  | |
| **A – 1.2** | **Registered Office Address** |  | |
| **A – 1.3** | Company/ Charity Registration No./ (if applicable) |  | |
| **A – 1.4** | Registered website address (if applicable) |  | |
| **A – 1.5** | VAT Registration No. (if applicable) |  | |
| **A – 1.6** | Name of immediate parent company (if applicable) |  | |
| **A – 1.7** | Name of ultimate parent company (if applicable) |  | |
| **A – 1.8** | **Type of Organisation:** | A public limited company |  |
| A limited company |  |
| A limited liability partnership |  |
| Other partnership |  |
| Sole trader |  |
| Third sector |  |
| Other |  |
| **A – 1.9** | Are you a Small, Medium or Micro Enterprise (SME)? | Yes | No |
| **A – 1.10** | Please state whether you fall within one of these supported businesses, and if so which one:   * Voluntary Community Social Enterprise (VCSE) * Sheltered Workshop * Public service mutual | Yes | No |
| If yes, please state which one | |
|  | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **A.2.1 Contact Details**  (Contact details for enquiries Barcud Shared Services may have about the content of this ITT) | | | | |
| **Name** | |  | | |
| **Position in Company** | |  | | |
| **Address** | |  | | |
| **Post Code** | |  | | |
| **Country** | |  | | |
| **Phone** | |  | | |
| **Email** | |  | | |
| **Consortia and Sub-Contracting** | | 1. Your organisation is bidding to provide the goods and/or services required itself. | |  |
| 1. Your organisation is bidding in the role of Primary Supplier/Contractor and intends to use third parties to provide some of the goods and/or services. | |  |
| 1. The Potential Supplier/Contractor is a consortium or Special Purpose Vehicle | |  |
| If your answer is (b) or (c) please indicate in a separate appendix (by inserting the relevant company/organisation name) the composition and governance of the supply chain, indicating which member of the supply chain will be responsible for the elements of the requirement. | | | | |
| **A – 2.2** | Is a principal Proprietor of your business related to an employee or Board Member of Barcud Shared Services or any of its clients as specified within the ITT document. | | **Yes** | **No** |
| Has any employee been employed or has been a Board Member of Barcud Shared Services or any of its clients as specified within the ITT document within the last 12 months? | | **Yes** | **No** |
| If Yes, please state their name and job title here. | | | |

# Section B – Financial Information

Please note: **All Tenderers are required to answer this section.**

**Section B is ‘Pass/Fail’.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Question No.** | **Description of Question** | | | | |
| **B – 1.**  **Pass/Fail** | Subject to being successful Barcud Shared Services will conduct a financial check on the Tenderer through the use of CreditSafe.  In order for Tenderers to successfully Pass this question they must have a CreditSafe overall risk rating of low or average  **In the event that a Tenderer has a higher-than-average risk rating Barcud Shared Services reserves the right to seek clarification from the Tenderer to allow them to provide an adequate explanation. If the Tenderer cannot provide an adequate explanation, Barcud Shared Services reserves the right to apply a Fail for this question.** | | | | |
| **B – 2.**  **Pass/Fail** | The minimum annual turnover requirement has been set at **the annual value of the lot applied for. If more than one lot is applied for, then this becomes cumulative.**  Please state your organisation’s financial turnover (from audited accounts) for the last two years beginning with the most recent figures. If your business has not been in operation for 2 years, please provide this information since creation of the business:  **In the event that a Tenderers turnover does not exceed the levels set out above then Barcud Shared Services reserves the right to seek clarification from the Tenderer to allow them to provide an adequate explanation. If the Tenderer cannot provide an adequate explanation, Barcud Shared Services reserves the right to apply a Fail for this question.** | | | | |
| **Answer** | | | | |
| Year: | To: | £ | | |
| Year: | To: | £ | | |
| **B – 3.**  **Pass/Fail** | Please indicate your organisation’s net profit (or loss) for the last 2 years beginning with the most recent figures, If your business has not been in operation for 2 years, please provide this information since creation of the business:  Your profitability is defined as Earnings Before Interest, Tax, Depreciation, and Amortization (EBITDA).  Please note. If you are successful you must be in a position to provide evidence if required, without delay, to confirm this prior to contract award.  If your organisation was not profitable in either of the last two financial years (i.e. reported a negative EBITDA) please provide an adequate explanation of how your organisation will be able to continue trading.  Details you may like to provide include:   * Explanation of why the reported EBITDA is affected by exceptional items e.g. changes to accounting practice * Projected profit / loss * Availability of assets to meet continued loss * Projected cash flow   **If you cannot provide an adequate explanation, Barcud Shared Services the right to apply a Fail for this question.** | | | | |
| **Answer** | | | | |
| Year: | To: | £ | | |
| Year: | To: | £ | | |
| **B – 4.**  **Pass/Fail** | **Insurance**  Please confirm that your organisation have the following specified levels of Insurance cover: | | | **Answer** | |
| **Yes** | **No** |
| Employer’s Liability Insurance -  £10,000,000 minimum cover  **Please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out.** | | |  |  |
| Public Liability Insurance - £5,000,000 minimum cover  **Please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out.** | | |  |  |
| ~~Professional Indemnity Insurance - £1,000,000 minimum cover??~~  **~~Please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out.~~** | | |  |  |
| ~~Product Liability Insurance - £5,000,000 minimum cover~~  **~~Please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out.~~** | | |  |  |
| If your organisation does not have the minimum requirement as stated above, is your organisation able and willing to increase, or put in place its insurance cover to meet the requirements prior to contract signature? | | |  |  |

# Section C – Quality Systems, Accreditations and Policies

Please note: **All Tenderers are required to answer this section.**

**Section C is ‘Pass/Fail’.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Question No.** | **Description of Question** | **Answer** | |
| **Yes** | **No** |
| **C – 1.**  **Pass/Fail** | Does your organisation have a Quality Management Policy or documented process?  **Please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out.**  ***Tenderers must be aware that if they have no policy in place then their bid will be rejected at this stage.*** |  |  |
| **C – 2.**  **Pass/Fail** | It is a requirement of this contract for suppliers hold up-to-date Gas-Safe accreditation (NICEIC or equivalent)  Please confirm that you will provide confirmation that your organisations/individuals delivering this contract will hold such qualifications. |  |  |
| **C – 3.**  **Pass/Fail** | Please confirm you will you comply with all Barcud Shared Services required policies as detailed in this ITT. |  |  |

# Section D – Health and Safety

Please note**: All Tenderers are required to answer this section.**

**Section D is ‘Pass/Fail’.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Question No.** | **Description of Question** | **Answer** | |
| **Yes** | **No** |
| **D – 1.**  **Pass/Fail** | Have you completed a National H&S Assessment process, demonstrating competence in Stage 1 Health & Safety Management Systems using the benchmark standard (CDM 2015 core criteria stage 1 or the Health & Safety Module of PAS91) through a full Registered Member of the SSIP (Safety Schemes in Procurement) Forum?  **If Yes, please provide your SSIP Registration Number here:** |  |  |
| **D – 2.**  **Pass/Fail** | Please confirm that your company has a Health and Safety Policy that includes the following:   * A Policy Statement - signed and dated. * The Organisation and Responsibilities - how Health and Safety requirements are implemented. * The Arrangements – standards and procedures adopted in practice. * The policy has been reviewed internally within the past two years.   **Please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out.**  Barcud Shared Services will check your Health and Safety policy to ensure the above conditions are met. |  |  |
| **D – 3.**  **Pass/Fail** | Has your organisation, during the last 3 years, been prosecuted or been served with a prohibition notice for contravention of the Health and Safety at Work Act 1974, or equivalent legislation?  If yes, please provide details of each occasion (on a separate piece of paper) to provide an adequate explanation of the actions taken to redress any damage and stop recurrence.  **Barcud Shared Services reserves the right to apply a Fail for this question if the Tenderer cannot provide an adequate explanation of the actions taken to redress any damage and stop recurrence.** |  |  |
| **D – 4.**  **Pass/Fail** | Has your organisation, during the last 3 years, been subject of a formal investigation by the Health and Safety Executive (HSE), or similar national body charged with supervision of health and safety standards?  If yes, please provide details of each occasion (on a separate piece of paper) to provide an adequate explanation of the actions taken to redress any damage and stop recurrence.  **Barcud Shared Services reserves the right to apply a Fail for this question if the Tenderer cannot provide an adequate explanation of the actions taken to redress any damage and stop recurrence.** |  |  |

# Section E – Sustainability and Environment

Please note: **All Tenderers are required to answer this section.**

**Section E is ‘Pass/Fail’.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Question No.** | **Description of Question** | **Answer** | |
| **Yes** | **No** |
| **E – 1.**  **Pass/Fail** | Does your organisation have a Sustainability and Environmental policy?  **Please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out.**  **Tenderers must be aware that if they have no policy in place then their bid will be rejected at this stage.** |  |  |
| **E – 2.**  **Pass/Fail** | Has there been any civil/criminal action against your organisation in respect of breaching environment legislation in the last 3 years?  If yes, please provide details of each occasion (on a separate piece of paper) to provide an adequate explanation of the actions taken to redress any damage and stop recurrence.  **Barcud Shared Services reserves the right to apply a Fail for this question if the Tenderer cannot provide an adequate explanation of the actions taken to redress any damage and stop recurrence.** |  |  |
| **E – 3.**  **Pass/Fail** | Please confirm that your organisation has a Carbon Reduction Plan.  If ‘Yes’, please attach your Carbon Reduction Plan as part of your tender submission. |  |  |
| **E – 4.**  **Pass/Fail** | Please confirm that your organisation is taking steps to reduce your GHG Emissions over time and is publicly committed to achieving Net Zero by 2050. |  |  |
| **E – 5.**  **Information**  **Only** | **Tenders are required to declare GHG Emissions and evidence how they have calculated these GHG Emission with their tender submission.**  The provided emissions data will be treated as information only and not used as a basis for assessment but may be used to track the successful Contractor/s progress in reducing their emissions over time.  For guidance on how to measure and report your GHG Emissions, please utilise UK Gov Carbon Calculator.   |  |  | | --- | --- | | **Answer** | | | **Provider Emissions Declaration** | | | **Baseline Year:** | | | Scope 1: |  | | Scope 2: |  | | Scope 3: |  | | **Reporting Year:** | | | Scope 1: |  | | Scope 2: |  | | Scope 3: |  | | | |

# Section F – Equal Opportunities and Modern Slavery

Text Box 2, Textbox

Please note: **All Tenderers are required to answer this question.**

**Section F is ‘Pass/Fail’.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Question No.** | **Description of Question** | **Answer** | |
| **Yes** | **No** |
| **F – 1.**  **Pass/Fail** | Do you have an Equality and Diversity Policy that complies with the Equalities Act 2010?  **Please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out.**  For organisations working outside of the UK please refer to equivalent legislation in the country that you are located.  **Tenderers must be aware that if they have no policy in place then they may be asked to adopt Barcud Shared Services policy or their tender will be rejected.** |  |  |
| **F – 2.**  **Pass/Fail** | In the last three years, has any finding of any unlawful discrimination been made against your organisation by any Court or Industrial Tribunal?  If yes, please provide details of each occasion (as a separate document) to provide an adequate explanation of the actions taken to redress any damage and stop recurrence.  **Barcud Shared Services reserves the right to apply a Fail for this question if the Tenderer cannot provide an adequate explanation of the actions taken to redress any damage and stop recurrence.** |  |  |
| **F – 3.**  **Information only** | Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act")?  Only proceed to F – 4 to F – 5 if you have ticked **Yes**. |  |  |
| **F – 4.**  **Pass/Fail** | If you have answered Yes to F – 3, are you compliant with the annual reporting requirements contained within Section 54 of the Act 2015? |  |  |
| **F – 5.**  **Pass/Fail** | If you have answered Yes to F – 4, please provide a copy of your statement. If you have answered No to F – 4, please attach an explanation as to why. | | |

# Section G – Community Benefits



|  |  |  |  |
| --- | --- | --- | --- |
| **Question**  **No.** | **Description of Question** | **Answer** | |
| **Yes** | **No** |
| **G – 1.**      **Pass/Fail** | Merthyr Valleys Homes is committed to contributing to the social, economic and environmental well-being of the wider community.    Do you confirm that your organisation is willing and committed to the delivery of Community Benefits through the life of any awarded contracts for the relevant housing association? This will be a financial contribution equal to 1% of the annual contract value of each lot as well as fulfilling the Community Benefits selected by the tendering organisation on the Community Benefits Menu.  **THIS APPLIES TO LOTs 1 AND 6 ONLY**  **Please self-certify by answering ‘Yes’ or ‘No’ that you meet the requirements set out** | ​​☐​ | ​​☐​ |
| **G – 2.**  **Yes/No** | Merthyr Valleys Homes is committed to contributing to the social, economic and environmental well-being of the wider community.  As well as fulfilling the Community Benefits selected by the tendering organisation on the Community Benefits Menu, would your organisation consider a financial contribution?  **THIS APPLIES TO LOTS 2, 3, 4, 5, 7 AND 8 ONLY** | ☐​ | ☐​ |

# Tender Declarations

**When you have completed all the ITT documents in full, please read and sign the below sections.**

|  |  |  |
| --- | --- | --- |
| **On behalf of:** |  | |
| **Full Name of Tenderer:** | |  |
| **Position Held**: |  | |

## 1.1 Tender Declaration

I certify that to the best of my knowledge the information provided is accurate and correct, I understand that the information provided will be used to assess the organisations suitability and I am signing on behalf of my organisation. I understand that Barcud Shared Services may reject this ITT if there is a failure to answer all relevant questions fully or if I provide false or misleading information.

I accept the contract conditions and undertakings requested in the Invitation to Tender. I confirm that we are willing and able to provide copies of all policies, statements and other documents referenced should Barcud Shared Services or its clients request to see them.

I understand that it is a criminal offence, punishable by imprisonment, to give or offer any gift or consideration whatsoever as an inducement or reward to any employee of Barcud Shared Services or its clients. Such action will empower Barcud Shared Services to cancel any contract currently in force with Barcud Shared Services or its clients and will result in our exclusion from the tendering process.

|  |  |  |
| --- | --- | --- |
| **Signature**: | |  |
| **Date:** |  | |

## 1.2 Form of Tender

I having read the Invitation to Tender document and hereby offer to execute and complete in accordance with the contract terms and conditions and the whole of the services described in the Priced Schedule for the sums/rates set out therein.

We undertake in the event of Barcud Shared Services acceptance to execute with Barcud Shared Services a formal contract embodying all the conditions and terms contained in this offer.

I agree that should obvious errors in pricing, or errors in arithmetic be discovered before acceptance of this offer in the priced schedule submitted by us these errors will be corrected in accordance with Alternative 2 contained in the “Code of Procedure for Selective Tendering 1996”.

I understand that Barcud Shared Services does not bind itself to accept the lowest, most economically advantageous, or any other tender.

In consideration of Barcud Shared Services checking and evaluating this Tender, I agree that this Tender remains open for acceptance for a period of 120 days, which shall be a binding contractual commitment.

I agree that unless and until a formal agreement is prepared and executed, the Tender, together with the Barcud Shared Services acceptance thereof in writing, shall constitute a binding contract between us.

|  |  |  |  |
| --- | --- | --- | --- |
| **Total Tender Sum Lot 1 (excl. VAT):** | | | £ |
| **Total Tender Sum Lot 2 (excl. VAT):** | | | £ |
| **Total Tender Sum Lot 3 (excl. VAT):** | | | £ |
| **Total Tender Sum Lot 4 (excl. VAT):** | | | £ |
| **Total Tender Sum Lot 5 (excl. VAT):** | | | £ |
| **Bidder Adjustment NHF Rate Lot 6** | | | % |
| **Bidder Adjustment NHF Rate Lot 7** | | | % |
| **Bidder Adjustment NHF Rate Lot 8** | | | % |
| **Signature**: | |  | |
| **Date:** |  | | |

## 1.3 Certificate of Non-Collusion

The essence of selective tendering is that the Barcud Shared Services shall receive a bona fide competitive tender from all companies tendering. In recognition of this principle, I certify that this is a bona fide tender, intent to be competitive, and that I have not fixed or adjusted the amount of the tender by or under or in accordance with any agreement with any other person. I also certify that I have not done nor will not do at any time before the return date of this tender any of the following acts:

1. Communicate to a person other than the person calling for these tenders the amount or approximate amount of the proposed tender; or
2. enter into any agreement with any other person that they shall refrain from tendering or as to the amount of any tender to be submitted; or
3. offer or pay or give or agree to pay any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other tender for the said work, any act of the sort described above.

In this certificate the word “person” includes any person and anybody or association, corporate or unincorporated and “any agreement or arrangement” includes any such transaction, formal or informal, and whether legally binding or not.

|  |  |  |
| --- | --- | --- |
| **Signature**: | |  |
| **Date:** |  | |