**Star Academies Trust**

**QUALIFYING QUESTIONNAIRE**

**V1.0**

**Multi-Function Printing Devices (MFD) Procurement**

**To be completed and returned with supporting documents by**

**Midday on the 16th November 2020**

To: Matthew Little

E-mail to matthew.little@staracademies.org

To: Mr Geoff Chandler

E-mail to [Geoff.chandler@moxton-education.com](mailto:Geoff.chandler@moxton-education.com)

Electronic Submission will be acceptable at this Stage

**BASIS AND CRITERIA FOR ACCEPTANCE**

**Multi-Function Printing Devices (MFD) Procurement**

**SHORT- LISTING PROCESS**

**This qualification questionnaire is divided into three sections.**

**Section A** requires you to provide background information about your company.

**Section B** requires you to provide evidence that you satisfy the Trust’s requirements to be considered for inviting to tender. Any items where the Trust at its sole discretion considers that you do not meet its requirements will preclude your company from being invited to tender.

**Section C** requires you to provide references that match as closely as possible the servicesto be provided under this contract. Referees will be asked to provide information about your performance and your delivery of the service to the contract standard.

These responses will be ranked by the Trust and a minimum of the top 5 companies shall form the basis of the shortlist of companies invited to tender for a 5-year contract to provide a Multi-function printing service to the Trust and its schools, provided that they continue to express an interest to do so.

Should applicants have any questions regarding this pre-qualification process or the information provided please submit them to Mr Geoff Chandler via e-mail, [Geoff.chandler@moxton-education.com](mailto:Geoff.chandler@moxton-education.com) CC Matthew.little@staracademies.org or by telephone 07970 661087. The closing date for applicants to submit questions is 5pm on the 30th October 2020. The Trust will provide an electronic response to all questions and to all applicants who have expressed an interest by 5pm on the 2nd November 2020 **or before.**

Completed Qualification Questionnaires, with all relevant additional information, must be submitted to the Trust by **Midday 16th November 2020**. Submissions received after this date and time may not be accepted. Submissions should be e-mailed to Matthew Little ([matthew.little@staracademies.org](mailto:matthew.little@staracademies.org)) and cc’d to Geoff Chandler ([Geoff.chandler@moxton-education.com](mailto:Geoff.chandler@moxton-education.com))

**Companies are advised that failure to respond to all the questions within the Qualification Questionnaire and / or failure to submit the necessary supporting documents and / or failure of referees to respond to reference requests may render their submission non-compliant and as such they may not be invited to receive the ITT from Star Academies Trust**

**Background**

The Star Academies Trust (Star) is currently a Trust of 30 schools located in 5 areas across the country There are 10 Primary schools, 19 Secondary schools and one ‘all through’ school. There is also a Head Office and Professional Development institute, both based in Blackburn.

The school estate is expected to grow to circa 44 schools over the lifetime of the contract.

The Trust Website is [www.staracademies.org](http://www.staracademies.org)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| No. | Name of School | Phase | Pupils | Hub Location |
| 1 | Tauheedul Islam Girls’ High School | Secondary | 838 | Lancashire |
| 2 | Tauheedul Islam Boys’ High School | Secondary | 620 | Lancashire |
| 3 | Eden Boys School - Preston | Secondary | 580 | Lancashire |
| 4 | The Valley Leadership Academy | Secondary | 354 | Lancashire |
| 5 | Bay Leadership Academy | Secondary | 689 | Lancashire |
| 6 | Highfield Leadership Academy | Secondary | 727 | Lancashire |
| 7 | The Olive School - Blackburn | Primary | 638 | Lancashire |
| 8 | The Olive School - Preston | Primary | 299 | Lancashire |
| 9 | Eden Boys’ leadership Academy - Bradford | Secondary | 118 | West Yorkshire |
| 10 | Laisterdyke Leadership Academy | Secondary | 909 | West Yorkshire |
| 11 | Tong Leadership Academy | Secondary | 925 | West Yorkshire |
| 12 | Thornbury Primary Leadership Academy | Primary | 608 | West Yorkshire |
| 13 | High Crags Primary Leadership Academy | Primary | 386 | West Yorkshire |
| 14 | Barkerend Primary Leadership Academy | Primary | 531 | West Yorkshire |
| 15 | Eden Boys’ School - Bolton | Secondary | 602 | Manchester |
| 16 | Eden Boys’ Leadership Academy - Manchester | Secondary | 364 | Manchester |
| 17 | Eden Girls’ Leadership Academy - Manchester | Secondary | 364 | Manchester |
| 18 | The Olive School - Bolton | Primary | 303 | Manchester |
| 19 | The Olive School - Manchester | Primary | 630 | Manchester |
| 20 | Eden Boys’ Leadership Academy - Birmingham East | Secondary | 336 | West Midlands |
| 21 | Eden Boys’ School - Birmingham | Secondary | 595 | West Midlands |
| 22 | Eden Girls’ School - Birmingham | Secondary | 330 | West Midlands |
| 23 | Eden Girls’ Leadership Academy - Birmingham | Secondary | 271 | West Midlands |
| 24 | The Olive School - Birmingham | Primary | 450 | West Midlands |
| 25 | The Olive School - Small Heath | Primary | 419 | West Midlands |
| 26 | Small Heath Leadership Academy | Secondary | 1105 | West Midlands |
| 27 | Starbank School | All Through | 2160 | West Midlands |
| 28 | Eden Girls’ School - Slough | Secondary | 561 | London |
| 29 | Eden Girls’ School - Waltham Forest | Secondary | 560 | London |
| 30 | The Olive School - Hackney | Primary | 625 | London |
| 31 | Star Academies Trust – Head Office |  |  | Blackburn |
| 32 | Star Institute - Office |  |  | Blackburn |

The majority of schools in the Trust currently have a contract for MFD’s but there are multiple, amounts of equipment, suppliers, pricing models and end dates of the various contracts.

**Going forward**

Going forward the Trust needs to run an EU tender to address the fact that a number of the end dates for the current contracts are in the Summer of 2021. At the same time this procurement also seeks to:

* Address the challenge of differing end dates so that there is one co-terminus date for all contracts
* Ensure there is a uniform pricing model
* Ensure there is a uniform maintenance model
* Ensure there is flexibility for schools to add devices as necessary throughout the lifetime of the contract
* Facilitate optional services eg regarding document management

In addition to the provision initial provision this procurement will therefore enable the Trust, at is sole discretion to:

* Add additional schools as an when needed

**This procurement**

In terms of this procurement, the companies identified from these shortlisting questions to receive the ITT will then receive a detailed set of requirements. For the purposes of this shortlisting stage bidders should assume that the ITT will include, but not be limited to;

* Provision of a range of Multi-functional printing devices to all the schools and offices
* An installation and commissioning service for each device
* A handover and training service
* A uniform maintenance service for any of the schools who have MFD’s across the Trust
* An automated service that addresses all consumable needs
* A service that includes appropriate print management software
* A service that ethically disposes of equipment as necessary
* A service that facilitates remote access
* A full Service Level Agreement
* Relevant monitoring, management and reporting
* A single technical interface to the Trust ICT Team
* Technical interface into the Trusts outsourced ICT Managed service provider
* Value added services

Bidders should note the following;

* The Trust will provide a standard contract as part of the ITT Pack. The contract is expected to be with one organisation that will manage all aspects of supply/service as well as the interface, as necessary, into their partner leasing company.

Further details about the solution requirements will be provided to those bidders who are shortlisted to receive the ITT pack.

The value of this procurement has been set with an upper limit of **£8m** over a maximum 5-year period. It is set at this value to include both existing sites and an increase of a further 14 schools during the lifetime of the contract.

**Selection Criteria**

The objective of the evaluation process is to assess the responses to this questionnaire and select potential contractors to proceed to the next stage of the procurement. Shortlisting will be based on the matters set out below.

1. Economic and Financial Standing – contractors must be in a sound financial position and able to demonstrate appropriate financial viability to perform the service to participate in a procurement of this size. As a minimum this is set at a revenue of 2 x this contracts maximum value. (Please answer questions as the bidding company, but if the bidding company is part of a Group please provide 3 years of Group accounts in addition).
2. Contractor Track Record - contractors must be able to demonstrate a successful track record of providing similar works to those envisaged and to school (as opposed to FE/HE) customers
3. Supplier technical capacity and capability – assessment of the technical ability and core competences of contractors.

**Stage 1**

The information supplied by applicants will first be checked for completeness and compliance with eligibility requirements before responses are evaluated. The Trust reserves the right to reject/disqualify any application that is incomplete or non-compliant.

**Stage 2**

Selection for inclusion within the tender list will be based on evaluation of the PQQ/SQ questions on the following criteria.

*Technical capacity*

1. Evidence of at least 5 years’ experience in the provision of Multi-Function Printing Services to the Education sector along with appropriate in-house systems, technical capability and key personnel with good technical knowledge. This includes evidence of ability to deliver to contract standards drawn from references.

*Economic and financial standing*

1. Evidence of economic and financial standing in respect of viability to perform the services including the submission and evaluation of three year’s detailed financial accounts, the latest not more than 18 months old. **Pass/Fail**
2. Suitable insurance cover. Public Liability to a minimum of £10,000,000 per occurrence, Employer’s Liability to a minimum of £10,000,000 (or statements that these will be obtained if awarded the relevant contract(s). **Pass/Fail**
3. A sound record of and clear policies of quality standards including, health & safety, Data-security/GDPR and equality. **Pass/Fail**

The Trust reserves the right not to select a potential contractor who has been assessed as having material weaknesses in one particular area covered by these PQQ/Initial selection questions, notwithstanding acceptable or even strong responses in all other areas.

The Trust gives no guarantee of the volume of work to be awarded under the contract and reserves the right to carry out work in-house.

**Timescales**

We expect the following timeframes to be adhered to following the submission of the PQQ/Initial selection questions. These timeframes are provided as indication only to support bidder planning and cannot be guaranteed.



**Note:** The Trust reserves the right to award the contract following ITT stage presentations and full review if it deems that no negotiation phase is needed. Ie if a further stage is required then this will be between the 12th – 19th February 2021

**Star Academies Trust**

**Multi-Function Printing Devices**

**Initial Selection QUESTIONNAIRE**

Questions should be answered in the name of the applying company, not a parent or holding company (unless indicated to do so in the questions).

**Supporting documents should be included where applicable.**

**SECTION A – BACKGROUND INFORMATION ABOUT YOUR COMPANY**

1. Name of company making application:

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1. Name of person dealing with this application.

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1. Address and telephone number and email address for correspondence:

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| --- |
| ADDRESS; |
| Telephone |
| Mobile Phone |
| Email: |
| Company Web Site Address: |
| DUNS Number |
| Registered VAT Number |
| Name, Date of Birth, Nationality of those persons with PSC (Person of Significant Control) – Please note that criminal records checks for relevant convictions maybe undertaken for the PSC of the preferred supplier. |

1. Registered Office (if different from above):

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1. Does the company operate as a sole trader, partnership, private limited company, public limited company or other? Please specify:

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1. Company Registration Number and date of Registration (if applicable)

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1. Details of the Ultimate Parent Company
   1. Full name
   2. Registered Address
   3. Company registration number
   4. DUNS Number
2. A brief history and outline of your company, including details of the management structure and the current number of employees. Larger companies should provide details of the regional or local structure (including a structure chart) that might be involved with this contract (please use separate sheet as necessary):

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1. Please list the relevant Associations your company is currently a member of

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1. Please provide the following information about your approach to this procurement

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| **Bidding model** | |
| **Question** | **Response** |
| Are you bidding as the lead contact for a group of economic operators? | Yes ☐  No ☐ |
| Name of group of economic operators (if applicable) |  |
| Proposed legal structure if the group of economic operators intends to form a named single legal entity prior to signing a contract, if awarded. If you do not propose to form a single legal entity, please explain the legal structure. |  |
| Are you or, if applicable, the group of economic operators proposing to use sub-contractors? | Yes ☐  No ☐ |
| If you responded yes to the use of sub-contractors, please provide additional details for each sub-contractor in the following table: we may ask them to complete this form as well.   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | Name |  |  |  |  |  | | Registered address |  |  |  |  |  | | Trading status |  |  |  |  |  | | Company registration number |  |  |  |  |  | | Head Office DUNS number (if applicable) |  |  |  |  |  | | Registered VAT number |  |  |  |  |  | | Type of organisation |  |  |  |  |  | | SME (Yes/No) |  |  |  |  |  | | The role each sub-contractor will take in providing the works and /or supplies e.g. key deliverables |  |  |  |  |  | | The approximate % of contractual obligations assigned to each sub-contractor |  |  |  |  |  | | |

1. Is your organisation defined an SME ? Yes / No

See EU definition of SME <https://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en>

**SECTION B**

**TRUST REQUIREMENTS FOR CONSIDERATION FOR INCLUSION ON THE SHORTLIST**

1. **Mandatory Exclusion**

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| **Grounds for Mandatory Exclusion**  Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences listed below. | |
| B1. Participation in a criminal organisation. | Yes ☐  No ☐  If Yes please provide details below: |
| B2. Corruption. | Yes ☐  No ☐  If Yes please provide details below: |
| B3. Fraud. | Yes ☐  No ☐  If Yes please provide details below: |
| B4. Terrorist offences or offences linked to terrorist activities | Yes ☐  No ☐  If Yes please provide details below: |
| B5. Money laundering or terrorist financing | Yes ☐  No ☐  If Yes please provide details below: |
| B6. Child labour and other forms of trafficking in human beings | Yes ☐  No ☐  If Yes please provide details below: |
| B7. If you have answered yes to questions above please provide further details.  Date of conviction, specify which of the grounds listed the conviction was for, and the reasons for conviction,  Identity of who has been convicted |  |
| B8. If you have answered Yes to any of the points above have measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion ? (Self Cleaning) | Yes ☐  No ☐ |
| B9. Has it been established, for your organisation by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which the organisation is established (if outside the UK), that the organisation is in breach of obligations related to the payment of tax or social security contributions? | Yes ☐  No ☐ |
| B10. If you have answered yes to B9 please provide further details. Please also confirm you have paid, or have entered into a binding arrangement with a view to paying, the outstanding sum including where applicable any accrued interest and/or fines. |  |

1. **ACCOUNTS / FINANCIAL INFORMATION**

**(a)** Please submit copies of audited or approved accounts (including group consolidated accounts if the company is part of a group) for the last three financial years,

Enclosed? **YES**   **NO**

**(b)** The Trust will apply its financial tests to your accounts including the requirement that turnover should be at least four times the annual value of the contract or at another level as specified solely at the Trust Business Manager

**(c)** Please submit the names and addresses of your bankers.

Enclosed? **YES**   **NO**

1. **CONFLICTS OF INTEREST**

Please detail what measures are in place to avoid any conflict of interest that could prejudice independence and objectivity during the tendering process and performance of the contract.

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1. **INSURANCE**

The Trust requires all of its contractors to maintain;

**(a)** Employer’s Liability insurance to a minimum value of £10,000,000;

Proof of insurance Enclosed? **YES**   **NO**  If not, explain why?

**(b)** Public Liability insurance to a minimum of £10,000,000 per claim;

Proof of insurance Enclosed? **YES**   **NO**  If not, explain why?

Please submit copies of cover notes showing that such insurance policies are in place or provide a statement confirming that your company would take out such insurance cover if awarded the contract.

1. **HEALTH AND SAFETY**

**(a)** Please enclose a copy of your Health and Safety Policy (covering General Policy, Organisation and Arrangements) and any codes of safe work practices issued to employees.

Enclosed? **YES**   **NO**

**(b)** Please enclose details of prosecutions or notices served on your firm by the Health and Safety Executive (or otherwise) in the last three years

Enclosed? **YES**   **NO**  **N/A**

(c) Please provide details of accident statistics inside your company over the last 3 years eg accidents per hours worked

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1. **EMPLOYMENT PROCEDURES**

Please enclose a copy of your procedures which should include:-

**(a)** assurance of checks on the eligibility of prospective employees to work in the UK;

**(b)** requirements for employees to disclose criminal convictions; and

Enclosed? **YES**   **NO**

1. **ENVIRONMENTAL POLICY**

Please enclose a copy of your environmental policy

Enclosed? **YES**   **NO**

1. **BUSINESS / TECHNICAL CAPABILITIES**

Please provide details of membership of any appropriate trade associations / federations.

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Does your company hold;

* 1. ISO 9002 certification? **YES**   **NO**
  2. ISO 14001 certification? **YES**   **NO**
  3. ISO 27001 certification? **YES**   **NO**

1. **OTHER REQUIRED POLICIES & STATEMENTS**

Please enclose a copy of your policies for:

1. Data Protection Policy/GDPR
2. Modern Slavery Statements – If applicable.
3. **EQUAL OPPORTUNITIES QUESTIONNAIRE**

**Background**

Your firm will be evaluated for equality in employment and service delivery on the basis of your answers to these questions. Please ensure that you answer every question and you provide sufficient information to enable the Trust to make a fair and accurate assessment of how you have dealt with equality issues. Please supply evidence to support your answers.

1. Is it your policy as an employer to comply with your statutory obligations under the Race Relations (Amendment) Act 2000, Disability Discrimination Act 2005, the Employment Equality (Age) Regulations 2006, the Equality Act 2006 and the Equality Act 2010 or any statutory modification or re-enactment thereof or any other statutory provision relating to discrimination in employment or the provision of services? Accordingly, is it your practice not to discriminate directly or indirectly on the grounds of colour, race, nationality, ethnic or national origins, sex, marital status, gender reassignment, disability, sexual orientation, religion, belief or age (“unlawful discrimination”) in relation to your decisions to recruit, select, remunerate, train, transfer and promote employees and in the provision of education, housing, goods, facilities or services, or other public functions (‘provision of services’) to the public?

**YES**   **NO**

1. In the last three years, has any finding of unlawful discrimination in the employment field been made against your company by an employment tribunal, the employment appeal tribunal or any court, or in comparable proceedings in any other jurisdiction?

**YES**   **NO**  If yes, please provide details including what steps your company has taken in consequence of that finding?

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1. In the last three years, has your company been the subject of formal investigation by the Equal Opportunities Commission, Disability Rights Commission or Commission for Equality and Human Rights, Commission for Racial Equality, or any comparable body, on the grounds of alleged unlawful discrimination in the employment field?

**YES**   **NO**  If yes, please provide details including what steps your company has taken in consequence of that finding?

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1. Are your policies on equal opportunities in employment and service delivery set out in;
2. instructions to those concerned with recruitment, selection, remuneration, training, promotion and provision of services;
3. documents available to employees, recognised trade unions, or other representative groups of employees;
4. recruitment advertisements or other literature available to staff/the public;
5. instructions to managers
6. instructions to staff
7. a staff conduct or disciplinary code; and
8. leaflets or other literature available to the public:

**YES**   **NO**

1. If your answer to either (a), (b), (c), (d), (e), (f) or (g) in question 5 is ‘No’, can you provide other evidence to show how you promote equal opportunities in employment and the provision of services?

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1. If you are not currently subject to UK legislation, please supply details of your experience in complying with equivalent legislation that is designed to eliminate discrimination and to promote equality of opportunity?

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1. In the last three years, has any contract with your company been terminated on grounds of your failure to comply with:

**(a)** legislation prohibiting discrimination; or

1. contract conditions relating to equal opportunities in the provision of services?

**YES**   **NO**

1. If the answer to question 7 is yes, what steps have you taken as a result of that finding?

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**SECTION C**

**INFORMATION ABOUT CURRENT OR RECENT SIMILAR CONTRACTS PERFORMED BY YOUR COMPANY AND REFERENCES**

1. **Outline of Company’s Experience**

Please provide details of your company’s experience in the last **FIVE** years of providing ***Multi-Function Devices to the Education (Schools) sector in the same/similar way to those required by this procurement***

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| Please use and add extra sheets if required. |

**2. references**

**2.1** Referring to the information provided above, please provide the names, full addresses and telephone numbers of two organisations, , for which your company is or have within the last 3 years provided services relevant to the Trust’s requirements and to whom reference can be made as to the standards provided by, and the performance of, your company.

**Be aware that it is your company responsibility to ensure that referees respond in a timely fashion as the responses to reference questions will form a material element in the evaluation at this stage**

**Referee 1**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of Organisation** | **Contact name** | **Nature of contract** | **Postal & E-mail address** | **Telephone number** |
|  |  |  |  |  |

**Referee 2**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of Organisation** | **Contact name** | **Nature of contract** | **Postal & E-mail address** | **Telephone number** |
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**CERTIFICATE**

I declare that to the best of my knowledge the answers submitted, and information contained in this document are correct and accurate.

I declare that, upon request and without delay I will provide the certificates or documentary evidence referred to in this document.

I understand that the information will be used in the selection process to assess my organisation’s suitability to be invited to participate further in this procurement.

I understand that the authority may reject this submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section.

I am aware of the consequences of fraudulent misrepresentation.

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| **Contact details and declaration** | |
| **Question** | **Response** |
| Contact name |  |
| Name of organisation |  |
| Role in organisation |  |
| Phone number |  |
| E-mail address |  |
| Postal address |  |
| Signature (electronic is acceptable) |  |
| Date |  |