

The Alliance Multi-Academy Trust (TAMAT)

QUALIFYING QUESTIONNAIRE

Find a Tender Service (FTS)

<u>V1.0</u>

Communications, Security & Telephony

To be completed and returned with supporting documents by Midday on the 13th November 2023

To: Gina Buxton E-mail to <u>cfo@tamat.org.uk</u>

To: Geoff Chandler

E-mail to geoff.chandler@moxton-education.com

Electronic Submission will be acceptable at this stage

BASIS AND CRITERIA FOR ACCEPTANCE

Communication, Security & Telephony

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 services to 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. Preference will be given to companies who can provide at least one reference from organisations of a similar context and size to the Trust.

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 Trust-wide Communication, security & Telephony service, 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 (and cc:cfo@tamat.org.uk) or by telephone on 07970661087. The closing date for applicants to submit questions is Midday on the 27th October 2023. The Trust will provide an electronic response to any questions and to all applicants who have expressed an interest by 5pm on the 3rd November 2023 **or before.**

Completed Qualification Questionnaires, with all relevant additional information, must be submitted to the Trust by **Midday on the 13th November 2023**. Submissions received after this date and time may not be accepted.

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 considered to be included in the shortlist to receive the ITT from TAMAT

Background

The Alliance Multi-Academy Trust (TAMAT) encompasses 5 schools and circa 1400 pupils in Surrey.

The Trust Website is https://www.tamat.org.uk

The current schools are as follows.

Academies	Pupils
Connaught Junior School	438
Holy Trinity Primary School	420
Windlesham Village Infant School	110
Crawley Ridge Infant School	179
Crawley Ridge Junior School	215

The Trust Head Office is currently at Windlesham Village Infant School

The Alliance Multi-Academy Trust or TAMAT was born, bringing together five of those initial schools and over 1400 children. We are proud that we have already achieved something that is unique – for the first time in Surrey, schools of both a secular and church nature have collaborated and found a way of coming together formally in a Multi-Academy Trust, for mutual benefit. There was an element risk because we had always relied on the local authority and/or diocese and did not want to lose our uniqueness.

The school leadership teams and governors committed to a new level and type of collaboration that benefits the children of all our schools enormously. We are enjoying the autonomy but also the added strength in resourcing that working together brings. But we have not come together to create TAMAT academy school "clones" – far from it. We fundamentally recognise the individuality of each school, their teachers, their cultures and environments, but most importantly their children and TAMAT will always respect that. And so, our doors are open to other like-minded partners and we invite you to find out more.

The Alliance Multi Academy Trust was formed in April 2018 and currently has 5 schools, 2 Infant Schools, 2 Junior Schools and 1 Primary School. TAMAT came together to provide the best education for our children through the best staff and systems. We have a clear focus on leadership, teaching, governance, professional development and collaboration at every level of the Trust.

Going forward - This procurement

This procurement encompasses the items noted below. In essence, this procurement is all about identifying a single supplier to provide a fully managed communications, security and telephony service. At the sole discretion of the Trust any future schools that the Trust may incorporate into the Trust will also be added to the ICT contract. Any additional schools will co-terminate to the end same end date of the initial contract.

Further details regarding bid timescales are noted below but in terms of the service this is advertised as a 60 month contract with start and end dates as follows:

Service start date – 1st June 2024 Service end date – 31st May 2029

The companies identified from these shortlisting questions to receive the ITT for the Managed communications, security and telephony partner will then receive a detailed set of requirements. For the purposes of this shortlisting stage bidders should assume that the ITT will include, but is not be limited to;

- A managed connectivity service to connect schools anywhere in England
- A broadband service for each school based on synchronous connectivity
- A 'failover' line
- A filtering and firewalled service
- A service that is compliant to latest KCSIE guidance
- A managed VoIP telephony service for each school to an agreed number of handsets each
- Support and maintenance service
- Full end to end single SLA approach
- Management of any 3rd parties required to provide the service
- Relevant monitoring, management, and reporting
- Full installation and transition service
- Value added services
- Technical interface into the Trusts outsourced support provision

Bidders should note the following:

- The Trust will provide a standard contract as part of the ITT Pack
- It is not expected there may be a requirement for TUPE

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 £300,000 over a maximum 60 month period.

To be clear, the upper limit noted above includes headroom for an additional 5 schools that may or may not join the Trust during the lifetime of the Contract, it is not a budgetary figure.

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.

- 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. (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).
- Contractor Track Record contractors must be able to demonstrate a successful track record of providing similar works to those required by this procurement. As well as information provided as part of this SQ, this may include due diligence carried out by the Trust which can include, but is not limited to, contracting the references provided.
- 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.

It is common to get many suppliers expressing interest by submitting an SQ. As such, completeness and compliance **will** be strictly enforced, and suppliers will **not** be contacted for missing information.

Stage 2

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

Technical capacity

1. Evidence of at least 5 years' experience in the provision of Communications Provider 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

2. 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 **including turnover and profit before tax**, the latest not more than 18 months old.

Failure to provide this information will result in automatic exclusion from the shortlist.

3. Suitable insurance cover. Public Liability to a minimum of £5,000,000 per occurrence, Employer's Liability to a minimum of £5,000,000 (or statements that these will be obtained if awarded the relevant contract(s).

Failure to provide evidence/assurance of this cover will result in automatic exclusion from the shortlist.

4. A sound record of and clear policies of quality standards including, health & safety, e-safety, GDPR and equality.

Failure to provide this information will result in automatic exclusion from the shortlist.

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 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 Initial selection questions. These timeframes are provided as indication only to support bidder planning and cannot be guaranteed.

Communications & Telephony		
SQ available	12th October	
SQ Clarifications open	12th October	
SQ Clarifications close	27th October	
Latest date for last clarification responses	3rd November	
SQ Submission date	13th November	
Indicative Timescales		
ITT Stage meeting for shortlisted bidders	23rd November	
Issue of ITT	23rd November	
Clarifications open	23rd November	
Clarifications close	8th November	
Latest date for last clarification responses	15th November	
ITT Submission	22nd December	
Bidder Presentations	11th January	
Trust Authorisation Process	12th to 18th January	
Award decision notice sent to bidders	19th January	
Alcatel Period	10 days until - 2nd February	
Orders placed from	End February	
Service Starts	1st June	

Note: The Trust reserves the right to award the contract following Stage 2 ITT stage presentations and full review if it deems that no negotiation phase is needed.

Communications, Security & Telephony Partner 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. Please do NOT embed documents in this response – if we cannot open an embedded document where one is requested, the questions will be deemed incomplete.

Section A - Supplier details	
Question	Response
1.1 (a) Full name of the potential supplier submitting the information	Mandatory Response
1.1 (b) - (i) Registered office address (if applicable)	Mandatory Response
1.1 (b) - (ii) Registered website address (if applicable)	
1.1 (c) Please check the relevant box to indicate your trading status	i) a public limited company Yes
, o	ii) a limited company Yes
	iii) a limited liability partnership
	iv) other partnership
	v) sole trader Yes
	vi) third sector Yes
	vii) other (please specify) Yes
1.1 (d) Date of registration in country of origin	Mandatory Response
1.1 (e) Company registration number (if applicable)	Mandatory Response
1.1 (f) Charity registration number (if applicable)	Mandatory Response
1.1 (g) Head office DUNS number (if applicable)	
1.1 (h) Registered VAT number	

1.1 (i) - (i) If applicable, is your organisation registered with the appropriate professional or trade register(s) in the member state where it is established?	YesNoNot Applicable
1.1 (i) - (ii) If you responded yes to 1.1(i) - (i), please provide the relevant details, including the registration number(s).	
1.1 (j) - (i) Is it a legal requirement in the state where you are established for you to possess a particular authorisation, or be a member of a particular organisation in order to provide the services specified in this procurement?	☐ Yes ☐ No
1.1 (j) - (ii) If you responded yes to 1.1(j) - (i), please provide additional details of what is required and confirmation that you have complied with this.	
1.1 (k) Trading name(s) that will be used if successful in this procurement	
1.1 (I) Please check the relevant boxes to indicate whether you fall within any of these classifications	i) Voluntary, Community and Social Enterprise (VCSE) ii) Sheltered workshop iii) Public service mutual
1.1 (m) Are you a Small, Medium or Micro Enterprise (SME)?	☐ Yes ☐ No
 1.1 (n) Details of Persons of Significant Control (PSC), where appropriate: Name; Date of birth; Nationality; Country, state or province where the 	■ Not Applicable
PSC usually lives; - Service address; - The date he or she became a PSC in relation to the company (for existing companies the 6 April 2016 should be used); - Which conditions for being a PSC are met;	

- Over 25% up to (and including) 50%, - More than 50% and less than 75%, - 75% or more ¹ .	
1.1 (o) Details of immediate parent company:	Not Applicable
 Full name of the immediate parent company Registered office address (if applicable) Registration number (if applicable) Head office DUNS number (if applicable) Head office VAT number (if applicable) 	
1.1 (p) Details of ultimate parent company:	■ Not Applicable
 Full name of the ultimate parent company Registered office address (if applicable) Registration number (if applicable) Head office DUNS number (if applicable) Head office VAT number (if applicable) 	

Please note: A criminal record check for relevant convictions may be undertaken for the preferred suppliers and the persons of significant in control of them.

Section A - Bidding model	
Please check the relevant box to indic	cate whether you are;
1.2 (a) - (i) Are you bidding as the lead contact for a group of economic	Yes
operators?	No
	If yes, please provide details listed in questions 1.2 (a) (ii), (a) (iii) and to 1.2 (b) (i), (b) (ii), 1.3, Section 2 and 3.
	If no, and you are a supporting bidder please provide the name of your group at 1.2 (a) (ii)

	for reference purposes, and complete 1.3, Section 2 and 3.
1.2 (a) - (ii) Name of group of economic operators (if applicable)	
1.2 (a) - (iii) 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.	
1.2(b) - (i) Are you or, if applicable, the group of economic operators proposing to use sub-contractors?	☐ Yes ☐ No
	(b) – (i), please provide additional details for e: we may ask them to complete this form as
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 supplies e.g. key deliverables
The approximate % of contractual obliga	tions assigned to each sub-contractor

Exclusion Grounds (Self-certification)

Please answer the following questions in full.

Please check the relevant box to indicate a "Yes" or a "No" response.

Section B - Grounds for Mandatory Exclusion		
2.1 (a) Regulations 57(1) and (2) The detailed grounds for mandatory exclusion of an organisation are set out on this <u>web page</u> , which should be referred to before completing these questions.	Pleas indica your selec	ate
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 within the summary below and listed on the webpage.		
(i) Participation in a criminal organisation.	Yes	No
lf Yes, please provide details at 2.1(b) (ii) Corruption. If Yes, please provide details at 2.1(b)	Yes	No
(iii) Fraud. If Yes, please provide details at 2.1(b)	Yes	No
(iv) Terrorist offences or offences linked to terrorist activities If Yes, please provide details at 2.1(b)	Yes	No
(v) Money laundering or terrorist financing If Yes, please provide details at 2.1(b)	Yes	No
(vi) Child labour and other forms of trafficking in human beings If Yes, please provide details at 2.1(b)	Yes	No
2.1 (b) If you have answered yes to question 2.1(a), 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		ie

If the relevant documentation is available electronically please provide the wissuing authority, precise reference of the documents.	veb add	dress,
2.2 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
2.3 (a) Regulation 57(3) 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
2.3 (b) If you have answered yes to question 2.3(a), please provide further deplease also confirm you have paid, or have entered into a binding arrangement view to paying, the outstanding sum including where applicable any accrued and/or fines.	ent with	

Please Note: The Trust reserves the right to use its discretion to exclude a potential supplier where it can demonstrate by any appropriate means that the potential supplier is in breach of its obligations relating to the non-payment of taxes or social security contributions.

Section 3 - Information about the Wider Group		
If you have indicated in this Selection Questionnaire question 1.2 that you are part of a wider group, please provide further details below:		a
Name of organisation		
Relationship to the Supplier completing these questions		
3.1 Are you able to provide parent company accounts if requested to at a later stage?	Yes	No
3.2 If yes, would the parent company be willing to provide a guarantee if necessary?		No
3.3 If no, would you be able to obtain a guarantee elsewhere (e.g. from a bank)?	Yes	No

Data Protection		
Requirements under the General Data Protection Regulation and Data F Act 2018	rotect	ion
(Please note that we would like to see summary answers in this section – wheexpect policy documents to be submitted, do not direct us to a document for		wer)
4.1 Are you registered with the UK Information Commissioners Office? If yes, please provide your registration number –	Yes	No
4.2 Please state your overall approach towards the EU General Data Protect Regulation and UK Data Protection Act 2018	ion	
4.3 What is your data retention policy and rules		
4.4 Access controls and information – what is your policy on access controls provide evidence of certification or adopting codes of practice?	? Can y	ou/ou
4.5 Do you use any subcontractors to deliver the service? If so, how do you and obtain assurances on the data protection and information security practic		nem

4.6 What contractual measure processed compliantly and se		sure personal data is
4.7 Do you have an incident nof data security incidents? Whincidents?	•	<u> </u>
4.8 Training and awareness for information security training a		
Section C - Trust Specific Q	uestions / Evidence	
Section C - Trust Specific Q 5.1 Key Personnel	uestions / Evidence	
5.1 Key Personnel Please name the key person	nel who would be involved in	this contract if your company al qualifications and length of
5.1 Key Personnel Please name the key person were to be awarded the cont	nel who would be involved in	
5.1 Key Personnel Please name the key person were to be awarded the cont relevant experience	nel who would be involved in	• • • • • • • • • • • • • • • • • • • •
5.1 Key Personnel Please name the key personnel were to be awarded the contrelevant experience Add key personnel here	nel who would be involved in ract, and outline their technic ed or approved accounts (inclurt of a group) for the most rec	al qualifications and length of uding group consolidated ent three financial years,
5.1 Key Personnel Please name the key person were to be awarded the cont relevant experience Add key personnel here 5.2 Accounts Please submit copies of audit accounts if the company is pashowing turnover and profit	nel who would be involved in ract, and outline their technic ed or approved accounts (inclurt of a group) for the most rec	al qualifications and length of uding group consolidated ent three financial years,
5.1 Key Personnel Please name the key personnel were to be awarded the contrelevant experience Add key personnel here 5.2 Accounts Please submit copies of audit accounts if the company is pashowing turnover and profit below	nel who would be involved in ract, and outline their technic ed or approved accounts (inclut of a group) for the most rect before tax and provide a su	al qualifications and length of uding group consolidated ent three financial years, mmary of this information

5.3 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.					
(Please note that this question is not asking <i>if</i> there are any existing conflicts of interest, it is asking what measure you have/will put in place to avoid conflict of interest)					
Add measures here.					
5.4 Insurance					
The Trust requires all of its contractors to maintain;					
Employer's Liability insurance to a minimum value of £5,000,000;					
Proof of insurance Enclosed? YES NO If not, explain why?					
Public Liability insurance to a minimum of £5,000,000 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.					
5.5 Health & Safety					
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 NONANA					
5.6 Eligibility to Work					
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; Enclosed? YES NO					
(b) requirements for employees to disclose criminal convictions; and					

Enclosed? YES NO				
(c) requirement for employees to undertake an Enhanced DBS Check Enclosed? YES NO				
5.7 Environmental Policy				
Please enclose a copy of your environmental policy				
Enclosed? YES NO				
5.8 Other Policies				
Please enclose a copy of your policies for the following				
(a) Data Protection Policy(b) GDPR				
(c) E-safety				
Enclosed? YES NO				
5.9 Modern Slavery Act 2015				
Are you a relevant commercial organisation as defined by section 54 (Transparency in supply chains etc) of the Modern Slavery At 2015				
YES N/A				
5.10 If you have answered yes to 5.9 is your organisation compliant with the annual reporting requirements contained within Section 54 of the Modern Slavery Act of 2015				
YES (Please provide URL) No (Please explain below)				
6.0 Your Company				
Please provide a brief history & overview of your company including any relevant partnerships and associations.				
[Your answer should be no longer than 1000 words – please add the word count at the end]				

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

OUTLINE OF COMPANY'S EXPERIENCE

Please provide details of your company's experience in the last three years of providing Communications, Security & Telephony service to the Education sector relating, where possible, to the sort of environment that TAMAT is tendering for.

[Your answer should be no longer than 1000 words – please add the count at the end]	word

REFERENCES

Referring to the information provided above, please provide the <u>names</u>, <u>full addresses and telephone numbers</u> 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.

<u>Preference will be given to companies who can provide references from organisations of a similar context and size to the Trust, i.e. a school Primary MAT.</u>

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

Referee 2

Name of Organisation	Contact name	Nature of contract	Postal & E-mail address	Telephone number
Contract Value PA	£			

Contact details and Declaration

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 serious misrepresentation.

1.3 (a) Contact Name	Mandatory Response
1.3 (b) Name of Organisation	Mandatory Response
1.3 (c) Role in Organisation	Mandatory Response
1.3 (d) Phone Number	Mandatory Response
1.3 (e) E-mail Address	Mandatory Response
1.3 (f) Postal Address	Mandatory Response
1.3 (g) Signature (electronic is acceptable)	Mandatory Response
1.3 (h) Date	Mandatory Response

<u>Please note all correspondence regarding this Questionnaire and the subsequent ITT process will be sent to the person described in 1.3 above.</u>