|  |
| --- |
|  |
| **INVITATION TO TENDER** |
| **For the Provision/Supply of [ ]**  SGUL Ref**:** [ ] |
| **[date]** |

|  |  |
| --- | --- |
| **CHECKLIST** | |
| **Have you returned the following?** | |
| **Schedule B – Form of Offer** |  |
| **Schedule C – Due Diligence Information** |  |
| **Schedule D – Supplier Questionnaire** |  |
| **Schedule E – Pricing Schedule** |  |

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**sECTION 1 – Tendering instructions**

* 1. **Introduction**
     1. St George’s, University of London (the ‘University’) wishes to invite competitive tenders for the provision of [ ] from [date] as detailed in the Specification is Section 2.
     2. The University is a small specialist university located in South West London. It has a long history dating back to 1733 and was formally established as a medical school in 1834. It is a constituent college of the University of London, gaining taught degree awarding powers in 2009 and GMC approval for awarding primary medical qualifications in 2010. The University, whilst remaining a constituent college of the University of London, has been awarding its own degrees since June 2012.
     3. The University enjoys a worldwide reputation for teaching and research excellence and is the only independently-governed medical school in England. It comprises of a campus co-located with St George’s University Hospitals NHS Foundation Trust in Tooting and its academic profile spans a range of disciplines within four institutes and a joint faculty, namely:
* The Molecular and Clinical Sciences Research Institute
* The Institute for Infection and Immunity
* The Population Health Research Institute
* The Institute for Medical and Biomedical Education
* The Faculty of Health, Social Care and Education (a joint enterprise with Kingston University)
  + 1. Within these programmes are medicine, biomedical science, healthcare science, clinical pharmacology, radiography, paramedic science, rehabilitation sciences, nursing, midwifery, social work and continuing professional development. A range of healthcare related foundation degrees are also offered. In addition, postgraduate programmes are offered in a number of health disciplines and research areas.
    2. The University is fully committed to equality, diversity and inclusion and continuously works towards ensuring that it is placed at the heart of everything that we do. We expect our suppliers to share these values and consider these essential areas when working with us.
    3. The University is home to over 5,500 students and over 800 members of staff and is located at Cranmer Terrace, Tooting, London SW17 0RE.
    4. Further information about the University is available on the University’s [website](http://www.sgul.ac.uk).
  1. **Completion of Tender**

The tender must conform to all requirements and conditions set out in this Invitation to Tender (ITT).

* + 1. **Tender Submission**

Your tender should comprise the following documents:

Schedule B – Form of Offer

Schedule C – Due Diligence Information

Schedule D – Supplier Questionnaire

Schedule E – Pricing Schedule

* + 1. **Form of Offer**

Complete and sign the Form of Offer in Schedule B.

* + 1. **Due Diligence Information**

Complete and sign the questionnaire in Schedule C

It comprises of questions which gather basic information about your organisation, financial standing and ability to provide the services.

You must complete each question contained in this questionnaire. If you fail to respond comprehensively and accurately to these questions, your tender may be deemed non-

compliant and the University reserves the right to exclude non-compliant tenders from further evaluation in the procurement.

* + 1. **Supplier Questionnaire**

Complete Schedule D of this Invitation to Tender (ITT) by inserting all of the details requested. Your answers should relate to the requirements outlined in Section 2 of this ITT.

* + 1. **Pricing Schedule**

Use the Pricing Schedule template in Schedule E to provide a clear breakdown of rates.

* 1. **Conditions of Tender**
     1. **Content of the Tender**

The tender is to be made strictly in accordance with the requirements of this ITT which, together with any addenda that are issued are referred to as the invitation to tender. The tender must be submitted in English and must be signed (electronic signature is acceptable) by the legally authorised representative of the tenderer(s).

* + 1. **Enquiries Concerning the Tender**

Any query in connection with the tender or the ITT shall be submitted via the University’s e-tendering web portal [‘In-Tend’](https://in-tendhost.co.uk/kingstonuniversity)

The contact for this tendering process is:

**[name]**

All requests for clarification or further information should be received no later than [date]. If deemed relevant by the University, the response by the University as well as the nature of the query will be notified to all tenderers without revealing the source of the query. On no account before the Tender Date is the tenderer to contact or communicate with any other person involved in work concerning this ITT unless the University redirects the query.

* + 1. **Independent Tender**

By submission of a tender, the tenderer warrants that:

1. The prices in the tender have been arrived at independently, without consultation, communication, agreement or understanding for the purpose of restricting competition, as to any matter relating to such prices, with any other tenderer or with any competitor.
2. Unless otherwise required by law, the prices which have been quoted in the tender have not knowingly been disclosed by the tenderer, directly or indirectly, to any other tenderer or competitor, nor will they be so disclosed.
3. No attempt has been made or will be made by the tenderer to induce any other person or firm to submit or not to submit a tender for the purpose of restricting competition.
   * 1. **Address for Submission**

Tenderers **must** send their tender and submit any queries via the University’s Procurement E-Tendering portal ‘In-Tend’. The Contract reference is **[ ].**

* + 1. **Modification by the University**

Any advice of a modification to the ITT shall be issued at least seven days before the Tender Date and shall be issued as an addendum to, and shall be deemed to constitute part of, the ITT. If necessary, the University shall revise the Tender Date in order to comply with this requirement. Unless under exceptional circumstances, no extension of time and date by which the tender shall be submitted will be granted.

* 1. **Preparation and Delivery of Tender**
     1. **Cost of Tender**

The University will not be responsible for any costs or expenses incurred by the tenderer in connection with the preparation or delivery or in the evaluation of the tender.

* + 1. **Language of Tender**

The tender and all accompanying documents are to be in English.

* + 1. **Validity Period of Tender**

All details of the tender, including prices and rates, are to remain valid for acceptance for three months after the Tender Date although the University may ask you to extend the period of validity.

* + 1. **Sufficiency of the Tender**

The tender shall contain all services that are essential for the complete conformance to the University’s requirements as well as for the complete performance of the services requested even if they are not explicitly mentioned in the tender documentation.

* + 1. **Tender Submission Date**

The tender must be submitted no later than **[time] on [date]** this being the Tender Date.

The University shall not consider tenders received after this deadline. Tenders are to be received in electronic format. Tenderers are responsible for ensuring that their tender reaches the University’s E-Tendering portal [‘In-Tend’](https://in-tendhost.co.uk/kingstonuniversity) prior to the deadline.

Tenderers that do not submit a tender are requested to delete all files and dispose of all documents as confidential waste and to confirm the observance of this request in writing prior to the afore-mentioned submission date.

The University may request hard copies of a submission after the tender submission date. Hard copies sent instead of a submission via In-Tend will not be accepted.

* + 1. **Tender Delivery**

Tenderers **must** send their tender via the University’s Procurement e-Tendering portal

[‘In-Tend’](https://in-tendhost.co.uk/kingstonuniversity).

The submission shall consist of generated (not scanned) pdf files (portable document files) or Microsoft Word. The submission should be formed of one document, however, if submissions are over 10MB, this will need to be split.

**Failure to follow these instructions may render the tender invalid.**

* + 1. **Invoicing and Payment**

The University’s payment terms are 30 days in arrears upon receipt of a valid invoice.

Invoices will be in Pounds Sterling (£).

* 1. **Treatment of Tender**
     1. **The University’s Discretion**

The University does not undertake to accept the lowest tender(s), or part, or all of any tender. The acknowledgement of receipt of any submitted tender shall not constitute any actual or implied agreement between the University and the tenderer. The University reserves the right to accept any part, or all, of any tender(s) at its discretion.

Before awarding the contract, the University may ask the tenderer to present their proposal, attend a clarification interview or may want to visit one or more of the tenderers offices and meet representatives of the management and staff.

* + 1. **Tender not Returned**

No part of the tender submitted will be returned to the tenderer.

* + 1. **Evaluation Criteria and Weightings**

Tenderers will be scored by the evaluation panel on their tenders and presentations.

The Contract will be awarded to the tenderer submitting the most economically advantageous tender taking into account the following criteria and weightings:

|  |  |
| --- | --- |
| **Award Criteria (e.g. Capability, Experience, Price, Added Value, Sustainability etc.)** | **Weighting** |
| [Criterion 1] | [ ] |
| [Criterion 2] | [ ] |
| [Criterion 3] | [ ] |
| [Criterion 4] | [ ] |
| [Criterion 5] | [ ] |

The evaluation process will be split into two stages and the bidder with the highest total score will be selected.

**Pricing will be scored as follows:**

The submission found to have the lowest price will receive the maximum weighted score for the price criterion. The remaining submissions will receive a score for the price criterion proportional to their differences to the offer with the lowest price.

* + 1. **Scoring methodology**

|  |  |
| --- | --- |
| **Scores (0-4)** | **To be applied if:** |
| **0** | No answer is given/Failed to address the question or meet the requirement/ Detrimental response or solution/ High risk that the relevant skills will not be available |
| **1** | Limited or poor evidence of skill or experience sought/ Medium risk that relevant skills will not be available/ Barely meets requirements |
| **2** | Meets or marginally exceeds the requirement/Acceptable response or solution to the specified requirement/ Satisfactory evidence shown of skill or experience sought |
| **3** | Exceeds requirement/ Demonstrates a very good understanding of the requirement/ Above acceptable response |
| **4** | Exceeds expectations/ Excellent response or solution/ Gives real confidence based on the requirement that the Service Provider will add real value by providing a quality service |

Where the panel considers that the response falls between the requirements for two whole mark scores, half marks may be awarded.

* 1. **Terms and conditions of the contract**

The contractual relationship shall be based upon the terms and conditions included in the draft contract and attached as Schedule A.

Any tenderer submitting an offer accepts thereby, in principle, the terms and conditions of this agreement without further negotiation or amendment.

* 1. **Proposed Timetable**

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Issue ITT |  |
| Deadline for ITT Clarifications |  |
| **Closing date for tender return** |  |
| Tender evaluation |  |
| Bidder Presentations/Interviews |  |
| Notification of outcome |  |
| Contract award |  |
| **Contract start date** |  |

***The above timetable for this tendering process is provided by way of guidance only. The University reserves the right to amend this timetable as it deems necessary.***

* 1. **Tender Presentation/Interview**

Shortlisted tenderers will be invited to attend an interview with the evaluation panel to discuss questions or clarify matters in relation to their tender on [date]. A separate notification will be sent to confirm the date and time, however, all tenderers are asked to keep this date available.

The interview will require you to make a short presentation no longer than [ ] minutes in duration which will be followed by [ ] minutes for questions and responses.

The purpose of the interview will be to moderate the scores awarded to the written tender, and to clarify any outstanding issues. No additional points have been reserved for this stage. The right is nonetheless reserved to seek additional information or clarification at any stage which may include requesting additional information from tenderers if appropriate.

* 1. **Accuracy of ITT Data**

The figures entered in this ITT are accurate at the time of issue, however, the University reserves the right to change the details as it deems necessary at any time prior to and after contract award.

* 1. **Duration**

The contract is expected to start on [date] and is to be for [ ] year/s with an option to extend it for up to [ ] further years, subject to the satisfactory delivery of services.

However, in the event that the University decides to review the contract as a consequence of changes in the organisation, it reserves the right to terminate the contract sooner than this with an appropriate period of notice, particularly if the provider is no longer able to meet the University’s needs.

**Section 2 – general information**

1. **[XYZ] Directorate**
2. [ enter background information about the University directorate ]​
3. [ enter details ]
4. **Systems**
   * 1. The University uses [enter relevant system details] for [enter relevant details]
     2. [ enter details ]
5. **Statistics**
   * 1. [Enter relevant statistics to assist bids]
     2. [ enter details ]
6. **Policies**
   * 1. [Embed relevant SGUL policies as applicable]
     2. [ enter details ]
7. **Other relevant information**
   * 1. [enter relevant information to assist bids]
     2. [ enter details ]

**Section 3 – Specificatio****n**

1. **Objectives**
2. The University’s key drivers for inviting tenders is to [ ].
3. [ enter details ]
4. **Scope and Requirements**

The contractor will be required to provide the following services in a cost effective structure:

* + 1. [ enter details ]
    2. [ enter details ]

1. **Deliverables**
   * 1. [ enter details ]
     2. [ enter details ]
     3. [ enter details ]
2. **Key Performance Indicators**
   * 1. [ enter details ]
     2. [ enter details ]
     3. [ enter details ]
3. **Contract Management & Reports**
   * 1. The contract will be managed by [ ] based with a nominated Contract Manager as the main point of contact/liaison. The service provider will be required to provide a named contact who can become conversant with the culture at the University and able to build up a positive working relationship between both parties.
     2. The service provider will also be expected to working in conjunction with the University’s other service providers where appropriate e.g. [ ].
     3. There will be regular meetings between the Contract Manager, other [department name] employees as appropriate and the provider to discuss contract progress and to identify any issues that require resolution.
     4. The service provide shall provide the University with [monthly] reports covering (add/delete as necessary):

* Detailed and qualitative reports on all activity
* Financial breakdown on the costs of services provided
* Performance against key performance indicators
* Success/evaluation criteria
* Quality monitoring of own service
* Any complaints and their resolution
  + 1. [enter details]

1. **Out of Scope**
   * 1. [List any areas that will be strictly out of the scope of the contract]
     2. [ enter details ]

**Section 4 – schedules**

Schedule A – Terms and Conditions of Contract

Schedule B – Form of Tender

Schedule C – Due Diligence Information

Schedule D – Supplier Questionnaire

Schedule E – Pricing Schedule

**Schedule A – Terms and Conditions of Contract**

[Insert appropriate and applicable terms and conditions e.g. [standard terms and conditions of purchase](http://www.kingston.ac.uk/purchase) – if in doubt, check with [Legal](https://kingstonuniversity.sharepoint.com/sites/staffspace/dep/GCLO/LSU/Pages/contracts.aspx)]

**Schedule B – Form of Offer**

[Your Name]

St George’s, University of London

[enter SGUL address]

**[enter tender closing date]**

Dear [Your Name]

**CONTRACT FOR THE PROVISION OF [CONTRACT TITLE] TO ST GEORGE’S, UNIVERSITY OF LONDON**

1. I/We have read the information provided in your Invitation to Tender and I/we offer to supply the services described in the said contract documents in such manner as may be required.
2. Terms and Conditions. I/We agree that this Tender and any contract which may result therefrom shall be based upon the documents listed below, and that the Buyer is St George’s, University of London:

* [List contract documents e.g. The specification, the supplier’s proposal/response, the University’s terms and conditions, relevant clarifications etc.]

1. The prices to be inserted in the Contract shall be those shown in Schedule E
2. The prices quoted in this Tender are valid for acceptance for three months after the Tender Date although the University may ask us to extend the period of validity and I/we confirm that the terms of the Tender will remain binding upon me/us and may be accepted by you at any time before that date.
3. I/we note that the contract shall be valid upon acceptance and signature by both parties of the Contract Documents.
4. Law. I/We agree that the construction, validity, performance and execution of any contract that may result from this Tender shall be governed by and interpreted in accordance with English Law and shall be subject to the exclusive jurisdiction of the Courts of England and Wales.
5. I/We agree to bear all costs incurred by me/us in connection with the preparation and submission of this Tender and to bear any further costs incurred by me/us prior to the award of any contract.
6. I/We agree that any other terms or conditions of contract or any general reservation which may be printed on any correspondence emanating from me/us in connection with this Tender or with any contract resulting from this Tender, shall not be applicable to this Tender or to the contract.

**Signed:**

**Name:**

**In the Capacity of:**

**Duly authorised to sign Tenders**

**for and on behalf of:**

**Registered Office:**

**(in block capitals)**

*The Form of Offer must be signed by an authorised signatory: in the case of a partnership, by a partner for and on behalf of the firm; in the case of a limited company, by an officer duly authorised, the designation of the officer being stated.*

**Schedule C – Due Diligence Information**

| **Question Number** | **Question** | | **Response** | | |
| --- | --- | --- | --- | --- | --- |
| 1 | Full name of the potential service provider submitting the information | | |  | | --- | |  | | | |
| 2 | Registered office address (if applicable) | | |  | | --- | |  | | | |
| 3 | Registered website address (if applicable) | | |  | | --- | |  | | | |
| 4 | Trading status  Is your organisation:  (please mark the relevant option with an ‘x’) | 1. A public limited company? | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | | |
| 1. A limited company? | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | | |
| 1. A limited liability partnership | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | | |
| 1. Other partnership? | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | | |
| 1. A sole trader? | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | | |
| 1. Third sector? | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | | |
| 1. Other (please specify your trading status):  |  | | --- | |  | | | | |
| 5 | Company registration number (if applicable) | | |  | | --- | |  | | | |
| 6 | Charity registration number (if applicable) | | |  | | --- | |  | | | |
| 7 | Registered VAT number | | |  | | --- | |  | | | |
| 8 | Trading name(s) that will be used if successful in this procurement | | |  | | --- | |  | | | |
| 9 | Are you able to provide a copy of your audited accounts for the last two years, if requested?  If no, can you provide one of the following: answer with Y/N in the relevant box: | | | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | |
| 9(a) | A statement of the turnover, Profit and Loss Account/Income Statement, Balance Sheet/Statement of Financial Position and Statement of Cash Flow for the most recent year of trading for this organisation. | | | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | |
| 9(b) | A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position. | | | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | |
| 9(c) | Alternative means of demonstrating financial status if any of the above are not available (e.g. forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status). | | | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | |
| 10 | We expect you to have an annual turnover which is at least equal to the indicative value of the contract which for this purpose is valued at [£]. Do you meet this requirement? | | | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | |
| 11 | Are you proposing to use sub-contractors? | | | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 12 | If you responded Yes to question 11, please provide additional details for each subcontractor in the following table (we may require them to complete this form too): | | | | | |
| **Details** | | **Subcontractor 1** | | **Subcontractor 2** | **Subcontractor 3** | |
| Name: | |  | |  |  | |
| Company Reg. No.: | |  | |  |  | |
| VAT number: | |  | |  |  | |
| The role the sub-contractor will take in providing the services: | |  | |  |  | |
| The approx..% of contractual obligations assigned to each sub-contractor: | |  | |  |  | |
| 13 | **Insurance**  It is a legal requirement that all companies hold Employer’s (Compulsory) Liability Insurance of £5million as a minimum. **Please note that this requirement is not applicable to Sole Traders.** Bidders who self-certify that they meet the requirements to these additional questions will be required to provide evidence of this if they are successful at contract award stage. | | | | | |
|  | Please self-certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated below:  Employer’s Liability Insurance = £[ ]  Professional Indemnity Insurance = £[ ] | | | | | |  |  |  |  | | --- | --- | --- | --- | | Yes |  | No |  | |
| **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. Upon request and without delay, I will provide the certificates or documentary evidence referred to in this document.** | | | | | | |
| Contact name: | | |  | | | |
| Name of organisation: | | |  | | | |
| Role in organisation: | | |  | | | |
| Phone number: | | |  | | | |
| Email address: | | |  | | | |
| Postal address: | | |  | | | |
| Signature (electronic is acceptable): | | |  | | | |
| Date: | | |  | | | |

## EVALUATION APPROACH

1. **Financial Risk Report**

The University will obtain a financial risk report on your organisation from Dun & Bradstreet Inc. and this report will be considered in conjunction with your response to sections 9 & 10 to determine whether you have the necessary financial standing to deliver the contract in accordance with the University’s requirements. If you fail this stage, you may be disqualified from the procurement.

1. **Insurance**

You will fail this section if you do not have and cannot commit to obtaining, prior to the commencement of the contract, insurance cover for all specified classes of insurance at or above the levels of indemnity specified. You will pass this section if you already have or can commit to obtaining, prior to the commencement of the contract, insurance cover for all specified classes of insurance at or above the levels of indemnity specified.

**Applicants who fail at this section will be notified and will take no further part in the procurement.**

**Schedule D – Supplier Questionnaire**

Tenders must be submitted on the basis specified in this ITT. If any part(s) of the individual requirements cannot be provided then this should be clearly stated; otherwise no comment is necessary.

Please respond to each of the requirements keeping responses as brief and succinct as possible. Include specific examples where necessary.

| **Ref** | **Weight-ing** | **Requirement and Tenderer’s response** |
| --- | --- | --- |
| **1** | **[ ]%** | **[Criterion 1]** |
| a | [ ]% | [ ] |
| **Tenderer’s Response:** |
|  |
| b | [ ]% | [ ] |
| **Tenderer’s Response:** |
|  |
| **2** | **[ ]%** | **[Criterion 2]** |
| a | [ ]% | [ ] |
| **Tenderer’s Response:** |
|  |
| b | [ ]% | [ ] |
| **Tenderer’s Response:** |
|  |
| **Tenderer’s Response:** |
|  |
| **3** | **[ ]%** | **[Criterion 3]** |
| a | [ ]% | [ ] |
| **Tenderer’s Response:** |
|  |
| b | [ ]% | [ ] |
| **Tenderer’s Response:** |
|  |
| **4** | **[ ]%** | **[Criterion 4]** |
| a |  | [ ] |
| **Tenderer’s Response:** |
|  |
| b |  | [ ] |
| **Tenderer’s Response:** |
|  |
| **5** | **[ ]%** | **[Criterion 5]** |
| a | [ ]% |  |
| b | [ ]% |  |

**Schedule E - Pricing Schedule**

Please note the following:

1. All prices should be exclusive of VAT.
2. All sums and rates shall be fixed for the contract term and any extensions and fully inclusive of all charges, supervision, preliminary costs, payroll costs and out of pocket expenses of all kinds including printing costs, telephone calls and travel/subsistence expenses necessary for the completion of the services.
3. Expenditure against any of the provisional sums and rates shall be agreed in advance with the Contract Manager. The service provider shall not be paid for any such costs howsoever incurred without such approval.
4. Unless otherwise agreed, the service provider shall only be entitled to invoice for completed activities as identified in the pricing schedule.
5. All details of the pricing schedules, including prices and rates, are to remain valid for acceptance for 3 months from the Tender Date.
6. Invoices are to be submitted via the Online Purchasing System. Payment will be made within 30 days upon receipt of a valid invoice.
7. Whilst overall cost will be a factor in determining the successful bid, the University does not undertake to accept the tender offered at the lowest cost nor does it undertake to accept any of the proposal at all.

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