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Berkshire RG12 1AQ
Tel: (01344) 352000



INVITATION TO TENDER (ITT)

for

HR/PAYROLL SYSTEM

COMPLETED BY

ORGANISATION	[Tenderer to complete]
NAME	[Tenderer to complete]
DATE	[Tenderer to complete]

TO BE COMPLETED AND RETURNED TO THE COUNCIL

This document contains **RESTRICTED INFORMATION** once completed by the Tenderer.

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1 Introduction

1.1 Background

- 1.1.1 Bracknell Forest lies 28 miles west of London, at the heart of the Thames Valley and within the county of Berkshire. Our economy is of above average size and productivity compared to the county and nationally. Good access links, a well educated labour force and the quality of the environment are key attractors to the companies that have and continue to locate here, including a number of multi-national organisations. The Borough has experienced pressures on housing, infrastructure services and environmental assets including sites designated as being important for nature conservation at an international, national and local level.
- 1.1.2 Bracknell Forest Borough Council (**the Council**) became a Unitary authority in April 1998. The Council's services are divided between four directorates, Corporate Services, Adult Social Care, Health & Housing, Environment, Culture & Communities and Children, Young People & Learning.
- 1.1.3 The existing human resource and payroll system (HR/Payroll System) has been in place for some years and no longer meets the needs of the Council. There are large amounts of over processing and unnecessary physical movement of paper. Removing the inefficiencies, through a combination of process improvement and the procurement of a new HR/Payroll System, should provide better outcomes for the Council and employees.
- 1.1.4 The existing HR/Payroll System is managed in-house however we will consider both in-house and externally hosted ICT systems.
- 1.1.5 The implementation will comprise two distinct phases. The first phase will be to replace the core HR (including self-service), absence management and payroll functionality. The second phase will consider wider functionality - recruitment, performance management and benefits administration - where there are demonstrable business benefits, value for money and budget availability. Optional pricing is also sought for an integrated training/development module and time management.
- 1.1.6 As at March 2014, there are 25 HR users, six Payroll users and approximately 300 managers. The HR/Payroll System is used for 5,000 active Council and school employees with an estimated growth up to 6,000 active employees. There are approximately 6,000 inactive employees.
- 1.1.7 The above estimate includes the provision of services to Academies and maintained and Free Schools within the Borough, however during the contract term the Council may wish to provide services to other public bodies within the United Kingdom. Optional pricing is being sought for additional licences should this occur.
- 1.1.8 Retention periods for records (data) are seven years after leaving employment.
- 1.1.9 The Council requires a product needing no bespoke software development; however modifications such as adding logos, organisation charts, reports and calculations (e.g. the buying and selling of leave) should all be possible within the existing functionality of the software.
- 1.1.10 The contract duration will be for a maximum of ten years, covering an initial period of four years plus two optional extensions, each of three years (i.e. 4 + 3 + 3).

1.2 Project Schedule

- 1.2.1 The following is the proposed timetable for the procurement and implementation of HR/Payroll System

Publish OJEU Contract Notice			
Advert in South East Business Portal			
Issue Invitation to Tender (on Portal)			
Last Questions from Tenderers			
Issue Final Question & Answer Summary			
Receive Response from Tenderers	NOON		
Supplier Presentations / Demonstrations			
Reference Site Visits			
Contract Award			
Phase I parallel running			
Phase I "Go Live"			

2 Instructions to Tenderers

2.1 Entry Level Questions

- 2.1.1 Please read through the documents included in this pack, in particular the Outline Specification (Schedule 7).
- 2.1.2 **Please complete Schedule 1 - Entry Level Questions.**
- 2.1.3 Please ensure that you include sufficient justification for any exception. **If you do not pass the Entry Level Questions, we will not be able to consider your full tender.**

2.2 General Instructions

- 2.2.1 If, having completed the Entry Level Questions, you intend to quote for the e-Procurement Hosted Solution, please read through the following instructions carefully and prepare your tender.
- 2.2.2 The Council will not be responsible for any costs or expenses you incur in preparing or delivering or in the evaluation of the tender, nor with any costs or expenses incurred with the formation of a contract should you be successful.
- 2.2.3 You are deemed to have obtained at your own expense, all information necessary for the preparation of your tender.

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2.2.4 Prior to the date for return of tenders, the Council may clarify, amend or add to the documentation. A copy of each such instruction will be issued by the Council to every contractor and shall form part of the tender documentation. No amendment shall be made to the tender documentation unless it is the subject of such an instruction. You should promptly acknowledge receipt of such instructions.

2.2.5 Clarifications of the invitation to tender documents must be made in writing by email to the following:

xxxxxxxxxxxxxxxxxxxxxx

This drop-box is monitored by xxxxxxxxxxxx, and/or xxxxxxxxxxxx

2.2.6 As soon as practical after receipt of any request for clarification, the Council will respond in writing to all tenderers except where the clarification has been identified by the tenderer, and subsequently agreed by the Council, as being commercially sensitive. The Council will not be bound to respond to any request for clarification of the Invitation to Tender which is received later than **xxxxxxxxxxxx**

2.2.7 Only clarifications made in writing by the Council will form part of the Invitation to Tender documents.

2.2.8 All questions submitted to the Council in writing and answers, will be logged, summarised and issued to all tenderers.

2.2.9 All information contained in the invitation to tender shall be treated as confidential except insofar as is necessary to be disclosed for the purposes of obtaining quotations essential for the preparation of your tender.

2.3 Submission of Tenders

2.3.1 The original, signed, tender must be submitted no later than xxxxxxxxx

Please submit to:

xxxxxxxxxxxxxxxxxxxxxx

2.3.2 Tenders received after the tender submission date/time may be rejected.

2.4 Tender Response

2.4.1 Please submit your tender by email to xxxxxxxxxxxx. Emails larger than 30Mb will be held by ICT pending manual release and emails above 50Mb will be rejected. For this reason, we recommended that you split into separate emails below 30Mb, clearly marked as 1 of 3, 2 of 3, etc., in the subject. Most business file types are acceptable; however any file containing code, password protection or seemingly inappropriate images will be automatically rejected. We are unable to accept tenders on USB stick.

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2.4.2 Your tender must be divided into two sections and contain the information called for in each section below:

The **technical** section should include:

- Entry Level Questions (Schedule 1)
- Organisation Information (Schedule 2)
- Method Statement (Schedule 3)
- References (Schedule 4)
- Outline Specification (Schedule 7)
- Tender Checklist (Schedule 9) should be completed and comments added if required.

No pricing should be included in the technical section.

The **commercial** section should include:-

- Firm prices in sterling for the Services must be entered on the Pricing Schedule (Schedule 6)
- The completed Schedule of Reserved Information - see guidance attached at Appendix E (Schedule 8)
- The Form of Tender statement (Schedule 10) completed, signed and dated.

Additionally, the Reference Request Forms (Schedule 5) are returned directly to the Council by the referees

2.4.3 Respond to all sections in the Method Statement and Outline Specification, Schedules 3 and 7. You should complete your responses in blue ink into this document. Alternatively, you may submit a separate document providing the tender cross references the section and paragraph numbers of this invitation to tender.

All sections must be responded to even if simply “Understood” or “Agreed”.

2.4.4 The Council has indicated a maximum number of words against some questions. The number indicated includes words in any charts, appendices and diagrams which are incorporated into the tenderer's response unless otherwise clearly indicated. In the event that the number of words is exceeded, the Council will only consider the first part of the tenderer's response up to the maximum allowed.

2.4.5 Where any external reference material, such as brochures, Outline Specifications and system descriptions, is used to support your tender, any statements within the reference material which may allow change to obligations or reduce liability, such as "Outline Specifications subject to change without notice", or other disclaimers will be regarded as void and shall not form part of the contract in the event that the tender is accepted.

2.4.6 Where a particular section of the tender response relates to information given in another section or in external reference material, then you must ensure that the response is clearly cross-referenced.

2.4.7 All pricing should be stated exclusive of VAT.

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2.4.8 Tenders shall remain open for an initial acceptance for a minimum of 180 calendar days, although the Council may ask you to extend of the period of validity.

2.5 Tender Decline

If you decide not to respond to this ITT, please let the contacts in Section 2.2.5 know by email as soon as possible, giving a brief reason(s).

2.6 Evaluation of Tenders

2.6.1 The evaluation will be carried out in two stages:

Stage 1

2.6.2 Suppliers must first pass the Entry Level Questions in Schedule 1.

2.6.3 Suppliers must also be financially sound. We use an external credit reference agency and, in addition, may seek copies of accounts and annual reports for larger contracts. We expect suppliers to have been trading long enough to have published accounts and developed a client base.

2.6.4 Suppliers passing this stage will progress to Stage 2. Suppliers failing this stage will be rejected.

Stage 2

2.6.5 The Council may seek confirmation that suppliers meet the Council's minimum levels of economic and financial standing or technical or professional ability, originally stated in the contract notice, at any time.

2.6.6 The contract will be awarded on the basis of the most economically advantageous offer having regard to:

2.6.7 The **Total Cost** of the goods, services or works, incorporating price and differential costs incurred by the Council (50% of the total score)

2.6.8 The **Quality** of the solution in terms of functionality and infrastructure (50% of the total score) takes into account issues such as; quality, price, technical merit, aesthetic and functional characteristics, environmental characteristics, after sales service, technical assistance, delivery date and delivery period and period of completion.

2.6.9 The **Total Cost** score is out of 100 marks and will be awarded based on a mathematical formula taking into account the overall weighting allocated to this particular section. In this instance, it is calculated by taking the lowest Total Cost divided by the next lowest Total Cost and multiplied by 100. As a result, the lowest Total Cost (subject to the provisions of regulation 30(6) of the Public Contracts Regulations 2006) will be awarded a score of 100 for price alone, with tenderers thereafter being allocated a relative score. This will be combined with quality, to give an overall score for each tenderer.

2.6.10 The Council's evaluation may include supplier presentations/demonstrations and reference site visits. Evaluation of these elements will be used to review the initial scoring based on further understanding gained.

2.6.11 If requested, demonstrations of the solution proposed must use a live system and follow scenarios pre-set by the Council. Reference site visits will take into consideration ease of use, response/run times and other customer experience of the system and related services.

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2.6.12 The headline **Quality** evaluation criteria are as follows:-

Criteria	Marks	Applicable Document(s) & Section(s)
Entry Level Questions	Pass/Fail	Schedule 1
Financial standing	Pass/Fail	ITT Section 2.6.3
Organisation Information	Pass/Fail	Schedule 2
Method Statement	52.95	Schedule 3
References	2.4	Schedule 4
Reference Request Forms	5.4	Schedule 5 x 3
Outline Specification	39.25	Schedule 7
FOI Schedule of Reserved Information	Not scored	Schedule 8
Tender Checklist	Not scored	Schedule 9
Form of Tender	Pass/Fail	Schedule 10
Total	100	

2.6.13 The evaluation spreadsheet which details any **sub-criteria** and formulae used is attached as Appendix D of this ITT.

2.6.14 The Council shall be under no obligation to award a contract for all or any part of the requirement set out in the Invitation to Tender, to any tenderer or at all.

2.6.15 You may be required to answer any Council queries on your proposal and to attend formal meetings with the Council during the tender evaluation period. Additionally the Council may wish to visit tenderers' premises to view the facilities and systems that may be used to deliver the service.

2.7 Alternative Offers

2.7.1 The Council will only consider offers for ICT systems which are managed in-house and/or externally hosted which meet the Council's specification. The Council will **not** consider any other alternative solutions, such as a fully managed service.

2.8 Canvassing

Any contractor who directly or indirectly canvasses any member or official of the Council concerning the award of the contract for the provision of the Goods/Services, or who directly or indirectly obtains or attempts to obtain information from any such member or official concerning any other tender for the Goods/Service will be disqualified. If discovery occurs after the award of the contract, the Council shall then be entitled to summarily terminate the contract.

2.9 Whistle blowing policy

Your attention is drawn to the Council's whistle blowing policy which can be found on the Procurement website at: www.bracknell-forest.gov.uk/procurement

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Appendix A – Terms and Conditions

In-House Managed System:

Refer to separate Word document “Appendix A1 Software Licence Agreement”

Hosted solution:

Organisations should submit their hosted services terms and conditions for consideration by the Council.

Support and Maintenance:

Organisations should submit their support and maintenance terms and conditions for consideration by the Council.

Third Party Software

Organisations should submit a copy of any third party software licence agreement(s) for consideration by the Council.

Appendix B – Example Service Levels

Refer separate Word document.

Appendix C – ICT Security & Operational Standards Required of Third Party Organisations

Refer separate Word document.

Appendix D – Evaluation Spreadsheet

Refer separate Excel document.

Appendix E – Freedom of Information Act 2000

GUIDANCE TO TENDERERS ON FREEDOM OF INFORMATION ACT 2000: ACCESS TO INFORMATION ABOUT OR ARISING UNDER CONTRACTS

1 Introduction

1.1 All information relating to any tender made to the Council or any contract to which the Council is party, including information arising under the contract or about its performance, will be covered by the Freedom of Information Act 2000 (the Act) from January 2005. The Council will be under a legal obligation to disclose such information if requested unless an exemption applies. The legal obligations to respond to a request for information falls on the Council. The Council must determine whether an exemption applies to information and whether the request should be refused. The Council may also be subject to disclosure obligations under other legislation or codes of practice. This Guidance sets out the approach of the Council to the disclosure of information about contracts.

2. General rules on disclosure

2.1 The Council has determined that, in the absence of special circumstances:-

- The Invitation to Tender (ITT) will always be available under the Act to those who enquire.
- Responses to tenders (apart from price information and commercially sensitive information – see below) will be held in confidence at least until award of the contract.
- Broad cost information will generally be available after award of contract under the Act to those who enquire.
- Information obtained from suppliers in responses to tenders and not generally available (future product information, research plans, financial details) will be held in confidence until no longer sensitive.
- Detailed tender prices will be held in confidence until no longer sensitive (see below).

2.2 Tenderers must therefore inform the Council, on the enclosed Schedule of Reserved Information, of such other information which it regards as being eligible for exemption from disclosure by the Council under the Act. The reasons for all such exemptions must be fully justified against the relevant section of the Act.

3. Reserved Information

3.1 The Act specifies a number of different grounds for exemption. Most of these are not considered to be relevant to a tendering process or subsequent award of contract. Those which are most likely to be relevant are:-

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- The information constitutes a trade secret (section 43(1))
- Disclosure would prejudice the commercial interest of any person (including the Council) (section 43(2))
- Disclosure would constitute an actionable breach of confidence (section 41(1))
- Personal data or information relating to the private life of any individual which is appropriate for protection (section 40)

3.2 If the Council agrees that information nominated by the successful tenderer may be legitimately classified as “reserved”, the Schedule of Reserved Information will form an integral part of the contract. The Schedule will list the class or category of information or the information itself and specify which exemptions under the Act apply to each specified class, category or specific information. The schedule shall indicate when it is likely that the information can be made available under the Act or if the information is unlikely ever to be made so available. Where such information is exempt under the rules governing commercial matters, (section 43(2)), then unless special circumstances apply, it will not be withheld under the Act for more than three years after completion/expiry of the contract.

3.3 Information relating to the overall value, performance or completion of the contract, contract records and administration will not generally be accepted as reserved information. The Council may however withhold access to such information under the Act in appropriate cases. The decision whether to withhold information shall be for the Council alone to determine. It shall have no obligation to consult the contractor.

3.4 The Council will automatically make information available under the Act from 3 years after completion/expiry of the contract, in the absence of specific agreement to the contrary. In the event that the Council receives a request for such information before the expiry of the 3 year period which it considers it may be appropriate to provide it will, wherever possible, notify the tenderer and take into consideration any representations made by the tenderer within 7 days of receipt of the notice by the tenderer.

4. Handling requests for information and notice to those affected

4.1 Other than as set out above the Council shall have no obligation to consult the contractor where any request for information, whether under the Act or otherwise, touches or concerns the contract.

5. Information about the provision of the service which is the subject of the contract which arises in the course of performance of the contract

5.1 The Council will have obligations to respond to the Act and other requests for information and the contract will include appropriate terms requiring the contractor to supply such information as requested by the Council.

5.2 Any enquiries about this policy and its application should be addressed to the Borough Solicitor, Bracknell Forest Borough Council, Easthampstead House, Town Square, Bracknell, Berks, RG12 1AQ

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3 Schedules

SCHEDULE 1 – Entry Level Questions

No.	Question	Answer
	A. SPECIFICATION	
1.	Can your organisation meet all the requirements set out in the Outline Specification?	Yes / No
2.	Has the system offered been used by customers with multiple pensions for the past 3 years or longer?	Yes / No
3.	Has the system offered been used by customers having staff with multiple contracts for the past 3 years or longer?	Yes / No
4.	Has the system offered been used by customers with multiple companies or organisations for the past 3 years or longer?	Yes / No
5.	Has the system offered been used by customers to transfer data electronically (including batch updates) to Unit4's Agresso Finance System for the past 3 years or longer?	Yes / No
6.	Can your organisation provide references where the system is used to manage Pensions and NI category for individual employees with multiple pension schemes and up to ten separate contracts?	Yes / No
7.	Can your organisation provide examples where the system is used for Statutory deductions of Tax/NI/SSP/SMP by employee; with SSP/SMP and Employers NI calculated and separated by up to ten contracts for a single employee?	Yes / No
8.	Can your organisation provide references where the system is used for Auto Enrolment processing, to complete enquiries from the Pensions Regulator?	Yes / No
9.	Does the system offered have self service functionality for Managers and Employees that has been in use by customers for 3 years or longer?	Yes / No
10.	Does the system offered have absence management functionality that has been in use by customers for 3 years or longer?	Yes / No
11.	Can your organisation provide at least three reference customers, that the Council may visit, that have at least 3 years live system use for local government HR/Payroll data, including teachers?	Yes / No
12.	Does the system offered meet the data requirements of "The Teachers' Pensions Regulations 2010", in particular Regulation 131, so that the Council can load the required data onto the Teachers Pensions portal in the required format?	Yes / No
13.	Has the system offered been used by customers with an active local government payroll of 6,000, or more, for the past 3 years or longer?	Yes /No
14.	The Council requires system set up by October 2014, parallel running from May 2015 to July 2015 and go-live in August 2015 – can your organisation achieve this?	Yes / No

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No.	Question	Answer
15.	Would the Council's data be held within the European Economic Area? Please select Not Applicable if the solution is to be managed in-house by the Council.	Yes / No / Not Applicable
16.	Is the proposed data centre ISO/IEC 27001 accredited or equivalent? Please select Not Applicable if the solution is to be managed in-house by the Council.	Yes / No / Not Applicable
B. ORGANISATION		
	The Council requires the following minimum insurance cover. By answering "Yes" you are confirming that the cover is already in place or will be in place by the start of the purchase order/contract. Please provide copies of current insurance certificates.	
17.	Public & Product Liability Insurance of GBP(£)5 million	Yes / No
18.	Employer's Liability Insurance of GBP(£)10 million	Yes / No
19.	Professional Indemnity Insurance of GBP(£)2 million	Yes / No
20.	Can you supply a copy of your latest Audited or Management Accounts?	Yes / No
21.	Do you agree to the Council's terms and conditions? (In-house managed system only). NB Hosted services & support/maintenance terms to be mutually agreed	Yes / No / Not Applicable
	If you answered " No " to any of the questions 1 to 21 please provide any justification(s) why your organisation's tender should still be considered by the Council below:	
22.	<i>Response</i>	
23.	Has your organisation, or any of its directors or senior staff, been found guilty for any of the following offences?	
24.	• Conspiracy	Yes / No
25.	• Corruption	Yes / No
26.	• Bribery	Yes / No
27.	• Fraud (including not paying taxes or social security contributions)	Yes / No
28.	• Money laundering	Yes / No
29.	• Professional misconduct	Yes / No
30.	Have your organisation, any of its directors, been previously declared insolvent or bankrupt?	Yes / No
	If you answered " Yes " to any of questions 23 to 30 please provide any justification(s) why your organisation's tender should still be considered by the Council below:	
31.	<i>Response</i>	

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Signature

Name

Job Title

Organisation

Date

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SCHEDULE 2 – Organisation Information

Notes for completion:

Please answer every question. Many procurements generate a great deal of interest from potential suppliers, so please ensure that you complete the questionnaire as requested. Failure to do so may result in your application being disqualified. If the question does not apply to you please write N/A; if you don't know the answer please write N/K.

“Authority” means the purchasing organisation that is seeking to award a contract.

“You”/ “Your” or “Potential Provider” means the business or company which is completing this form.

Verification of Information Provided:

The higher the risk of the procurement, the higher the level of verification is likely to be required. Not all questions require supporting documents up front at this stage (for example certificates, statements with this questionnaire.) **However, the purchasing organisation may ask to see these documents at a later stage, so it is advisable you ensure they can be made available upon request.** You may also be asked to clarify your answers or provide more details about certain issues.

Sub Contracting Arrangements

Where a sub-contracting approach is proposed, all information requested should be given in respect of the prime contractor.

Where sub-contractors will play a significant role in the delivery of the services or products under any ensuing contract, please indicate in a separate annex (by inserting the relevant company/organisation name) the composition of the supply chain, indicating which member of the supply chain will be responsible for the elements of the requirement.

It is recognised that arrangements in relation to sub-contracting may be subject to future change. However, Potential Providers should be aware that where sub-contractors are to play a significant role, any changes to those sub-contracting arrangements may constitute a material change and therefore may affect the ability of the Potential Provider to proceed with the procurement process or to provide the goods and/or services.

Consortia Arrangements

If the potential provider bidding for a requirement is a consortium, the following information must be provided:

- full details of the consortium; and
- the information sought in this FORM in respect of each of the consortium's constituent members as part of a single composite response.

Potential Providers should provide details of the actual or proposed percentage shareholding of the constituent members within the consortium in a separate Annex. If a consortium is not proposing to form a corporate entity, full details of alternative proposed arrangements should be provided in the Annex. However, please note the Authority reserves the right to require a

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successful consortium to form a single legal entity in accordance with regulation 28 of the Public Contracts Regulations 2006.

The Authority recognises that arrangements in relation to consortia may (within limits) be subject to future change. Potential Providers should therefore respond in the light of the arrangements as currently envisaged. Potential Providers are reminded that any future proposed change in relation to consortia must be notified to the Authority so that it can make a further assessment by applying the selection criteria to the new information provided.

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FORM A: ORGANISATION AND CONTACT DETAILS

Full name of organisation tendering (or of organisation acting as lead contact where a consortium bid is being submitted)		
ORGANISATION DETAILS		
Registered office address	Company or charity registration number	
	VAT registration number	
	Name of immediate parent company	
	Name of ultimate parent company	
Type of organisation	i) a public limited co.	
	ii) a limited company	
	iii) a limited liability partnership	
	iii) other partnership	
	iv) sole trader	
	v) other (please specify)	

CONTACT DETAILS	
Contact details for enquiries about this FORM	
Name	
Address	
Post Code	
Country	
Phone	
Mobile	
Email	

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Consortia and Sub-Contracting	a) Your organisation is bidding to provide the services required itself	
	b) Your organisation is bidding in the role of Prime Contractor and intends to use third parties to provide some services	
	c) The Potential Provider is a consortium	
<p>If your answer is (b) or (c) please indicate in a separate annex (by inserting the relevant company/organisation name) the composition of the supply chain, indicating which member of the supply chain (which may include the Potential Provider solely or together with other providers) will be responsible for the elements of the requirement.</p>		

QUESTIONS 1.1 and 1.2 FOR COMPLETION BY NON-UK BUSINESSES ONLY		
1.1	<p>Registration with professional body</p> <p>Is your business registered with the appropriate trade or professional register(s) in the EU member state where it is established (as set out in Annexes IX A-C of Directive 2004/18/EC) under the conditions laid down by that member state).</p>	
1.2	<p>Is it a legal requirement in the State where you are established for you to be licensed or a member of a relevant organisation in order to provide the requirement in this procurement? If yes, please provide details of what is required and confirm that you have complied with this.</p>	

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HR/PAYROLL SYSTEM**INVITATION TO TENDER****FORM B - GROUNDS FOR DISCRETIONARY REJECTION****Important Notice.**

The Authority is entitled to exclude you from consideration if any of the following apply but may decide to allow you to proceed further. If you cannot answer 'no' to every question it is possible that your application might not be accepted. In the event that any of the following do apply, please set out (in a separate Annex) full details of the relevant incident and any remedial action taken subsequently. The information provided will be taken into account by the Authority in considering whether or not you will be able to proceed any further in respect of this procurement exercise.

Please state 'Yes' or 'No' to each question.

Is any of the following true of your organisation?	
(a) <u>being an individual</u> , is bankrupt or has had a receiving order or administration order or bankruptcy restrictions order made against him or has made any composition or arrangement with or for the benefit of his creditors or has not made any conveyance or assignment for the benefit of his creditors or appears unable to pay or to have no reasonable prospect of being able to pay, a debt within the meaning of section 268 of the Insolvency Act 1986, or article 242 of the Insolvency (Northern Ireland) Order 1989, or in Scotland has granted a trust deed for creditors or become otherwise apparently insolvent, or is the subject of a petition presented for sequestration of his estate, or is the subject of any similar procedure under the law of any other state;	Yes / No
(b) <u>being a partnership constituted under Scots law</u> , has granted a trust deed or become otherwise apparently insolvent, or is the subject of a petition presented for sequestration of its estate; or	Yes / No
(c) <u>being a company or any other entity within the meaning of section 255 of the Enterprise Act 2002</u> has passed a resolution or is the subject of an order by the court for the company's winding up otherwise than for the purpose of bona fide reconstruction or amalgamation, or had a receiver, manager or administrator on behalf of a creditor appointed in respect of the company's business or any part thereof or is the subject of similar procedures under the law of any other state?	Yes / No
Has your organisation	
(a) been convicted of a criminal offence relating to the conduct of your business or profession;	Yes / No
(b) committed an act of grave misconduct in the course of your business or profession;	Yes / No
(c) failed to fulfil obligations relating to the payment of social security contributions under the law of any part of the United Kingdom or of the relevant State in which you are established;	Yes / No
(d) failed to fulfil obligations relating to the payment of taxes under the law of any part of the United Kingdom or of the relevant State in which you are established; or	Yes / No
e) been guilty of serious misrepresentation in providing any information required of you under Regulation 23 of the Public Contracts Regulations 2006?	Yes / No

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FORM D - Economic and Financial Standing Regulation 24

2 FINANCIAL INFORMATION

If, for some reason, your organisation is not required to produce Audited Accounts or an Annual Report then the Council's Finance Section will need to have visibility of your management accounts. The Council will seek more information from independent credit reference agencies as part of the evaluation and reserves the right to undertake credit checks at each stage of the procurement process.

NB We will not accept applications from more than one company forming part of the same Group

2.1	Please indicate which of the following you would be willing to provide:- (please indicate which one by ticking the relevant box)	
	<i>A copy of your audited accounts for the most recent two years</i>	
	<i>A statement of your turnover, profit & loss account and cash flow for the most recent year of trading</i>	
	<i>A statement of your cash flow forecast for the current year and a bank letter outlining the current cash and credit position</i>	
	<i>Alternative means of demonstrating financial status if trading for less than a year</i>	

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SCHEDULE 3 – Method Statement

3.1 Outline Specification

3.1.1 Please complete the functional requirements matrix in Appendix A of the Outline Specification (Schedule 7), using the following codes plus a brief explanation against each requirement:-

1. Fully compliant and is provided within the price stated in the Pricing Schedule.
2. Partially compliant within the price stated (please provide comment)
3. Not included in the cost but available at additional cost. Any additional costs should be detailed separately in the Pricing Schedule.
4. Not included

Non-compliant tenders may be rejected.

3.1.2 If there are any major exceptions, please detail below

Information item only – not scored as this will be covered by Schedule 7.

Response

3.1.3 Please provide an overview of the proposed system, including

- i. Whether it is to be run in-house or offered as a hosted solution or both options are available,
- ii. Which modules will be included
- iii. Interfaces to other systems
- iv. Underlying database
- v. Report writing software, including any context sensitive facility
- vi. Robust audit trail
- vii. Multiple access levels
- viii. Workflow / authorisation processes

Response [Maximum 1,500 words]

3.1.4 Please provide a brief description and diagram to depict the functional aspects of the solution.

Response [Maximum 400 words, excluding diagram]

3.1.5 Please provide a brief description and diagram to depict the application architecture.

Response [Maximum 400 words, excluding diagram]

3.1.6 Please provide details of how the system offered interfaces to Unit4's Agresso. Has this interface been in operation for the past 3 years or longer?

Response [Maximum 500 words]

3.1.7 List all third party software (and publisher) that you are intending to use:

Response

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3.1.8 Explain how the system offered meets the data requirements of “The Teachers’ Pensions Regulations 2010”, in particular Regulation 131, so that the Council can load the required data onto the Teachers Pensions portal in the required format. Please provide a sample file using test data in a suitable format.

Response [Maximum 250 words]

3.1.9 A critical element of the project is to migrate the data from the existing HR/Payroll System. Please detail your proposed approach to data migration; this should include methods for data verification and rollback in the event of a failed migration. If specific tools will be used to complete this process please state which. (Note: Due to multiple organisation structures, data migration may need to be staged by groups of employees or by data type).

Response [Maximum 500 words]

3.1.10 A flexible reporting capability is required for management reports, with benchmarking, graphs and charts where possible. Please describe the functionality available and enclose examples of five standard reports for the following:

- i. Employee contract generation
- ii. Establishment report
- iii. Absence report, sub-totalled by employee and department
- iv. Auto-enrolment pension report
- v. Breakdown of payments by individual element, by employee

Response [Maximum 500 words, Reports unlimited]

3.1.11 Where possible, please provide a list of planned software developments in the next 12-24 months of the HR/Payroll system, include, for example any new modules and/or mobile applications.

Information item only – not scored.

Response

3.2 General

3.2.1 Please provide a brief overview of your organisation and how it could best provide the HR/Payroll System required by the Council, as detailed in the Outline Specification.

Response [Maximum 300 words]

3.2.2 Include details on how many staff your organisation employ, and related turnover (GBP £), that are relevant to the provision of the goods/services similar to those set out in the Outline Specification.

Response [Maximum 200 words]

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3.2.3 Please provide details of any consortia members or named sub-contractors, including any data centre provider, where appropriate.

Response

3.2.4 When do you consider would be the optimal time to implement the self-service functionality? Please explain your recommendation.

Information item only – not scored.

Response [Maximum 300 words]

3.2.5 The Council requires system set up by October 2014, parallel running from May 2015 to July 2015 and go-live in August 2015 for Phase I (core HR/Payroll system). The remaining modules are likely to go-live over the following 12-18 months.

Please provide a high level project plan to achieve these dates.

Response [Maximum 100 Words & Unlimited for Project Plan]

3.2.6 Please provide details of the help/support to be provided which is included in your tender price. These should take account of administrator/user training and support, establishment of workflow processes, and creation/translation of reports that are currently written in Impromptu and Crystal as a minimum.

NB please see separate question 3.5.1 regarding training

Response [Maximum 500 Words]

3.2.7 What are the key expectations that you have of the Council in respect of our responsibilities, obligations and effort required for a successful implementation? Please include target dates. Attach a separate sheet if necessary.

Response

3.3 Technical Requirements

3.3.1 For in-house managed solutions, please outline the infrastructure requirements, including

- i. Servers – quantity, minimum processor, space required etc.
- ii. Database software and version(s)
- iii. Operating system and version(s)
- iv. Other third party software (with versions)

Response [Maximum 400 Words]

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- 3.3.2 For externally hosted solutions, please outline data security, including
- Data centre security measures
 - Vulnerability and penetration testing
 - Location of servers/Council data
 - How personal data is protected and related policy(ies) up to IL3.

Response [Maximum 400 Words]

- 3.3.3 For hosted solutions, please explain how the Council's data is backed up, how often, where, and how this data could be accessed at the end of the contract or, for example, should your organisation cease trading.

Response [Maximum 300 words]

- 3.3.4 Please outline any minimum usage requirements, including
- Network – e.g. bandwidth, protocols, latency, security, etc
 - Client devices
 - Other applications required to deliver full service

Response [Maximum 400 Words]

- 3.3.5 The Council and schools use a variety of browsers. Please list the browsers, and related versions, supported:

Response

3.4 Equal Opportunities

- 3.4.1 Does your organisation have an Equal Opportunities policy? If yes, please indicate how it is communicated to employees.

Response [Maximum 250 words]

- 3.4.2 If No, please refer to the Council's equal opportunities document at:

<http://www.bracknell-forest.gov.uk/equality-and-diversity-guidance-for-employers.pdf>

In the absence of your own policy, please download document and confirm acceptance by signing and returning instead.

Attached / Not applicable

- 3.4.3 Have any Industrial Tribunal or other Legal cases (pending or otherwise) relating to equality issues been brought against your organisation within the last three years? If yes, please provide details

Response [Maximum 200 words]

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3.4.4 Does the proposed HR/Payroll system meet or exceed the current W3C Web Content Accessibility Guidelines 2.0, level AA (<http://www.w3.org/TR/WCAG20/>) or equivalent? If not, what measures are being taken to support accessibility for everyone, in particular the self-service functionality?

Response [Maximum 300 words]

3.5 Technical Ability - Staff

3.5.1 Please provide a summary of qualifications and experience for the proposed Project Manager and other key personnel.

Response [Maximum 250 words per person]

3.6 Training

3.6.1 Please summarise the proposed training programme for Council staff assuming this will initially be on a “train the trainer” basis. Include details of any eLearning packages available. Any on-site training can be provided on the Council’s premises for up to 18 users per session.

Please submit a separate training plan.

Response [Maximum 500 words, excluding Training Plan]

3.7 Contracts and References

3.7.1 List up to ten relevant current contracts you have with Local Authorities or other Public Sector bodies. Please include

- i. Customer organisation
- ii. Contract title or subject
- iii. Approximate contract value
- iv. Contract start date and/or expiry date

Response

3.7.2 **Complete Schedule 4**, providing full contact details for three References. You will need to send a copy of the Reference Request Form (Schedule 5) to each of your named contacts, including within the allotted green box, an outline of the contract that you performed for them.

The completed form must be returned directly to the Council (**HR.Pay@Bracknell-Forest.gov.uk**) by the referee, by the Tender deadline, or it will not be considered

3.7.3 If you cannot provide three references, please advise why:

This is a Pass/Fail question.

Response

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3.7.4 Please provide at least two examples where the proposed system is used for Statutory deductions of Tax/NI/SSP/SMP by employee; with SSP/SMP and Employers NI calculated and separated by up to ten contracts for a single employee?

Response

3.7.5 In the last three years, have you had any contracts:

- i. That have incurred contract penalties, default notices or payment of liquidated damages?
- ii. Terminated by the client earlier than originally intended due to poor performance?
- iii. Where you have withdrawn from the contract either before or after the award of contract?

If yes to any of the above, please give details and explain what has been rectified in order to avoid this situation arising in the future.

Response

3.8 Service Levels & Performance

3.8.1 Please refer to Appendix B, Example Service Levels. The Council's optimal Service Level is "Silver" and this will be used for evaluation purposes, however please include additional costs or reduction in the Pricing Schedule for Bronze, Gold and Platinum service level where available.

Please advise the standard service levels your organisation provides and any options available.

Response [Maximum 400 words]

3.8.2 Please detail the service credits that your company proposes, covering

- i. Delays in successfully achieving Council acceptance
- ii. Failures to meet target fix time for Priority 1 issues
- iii. Failures to meet target fix time for Priority 2 issues
- iv. Failures to meet the system availability percentage (Hosted solution only)

Response

3.8.3 For in-house managed solutions, how often, and when, are upgrades/patches usually released? Who is responsible for installation and within what time frame is it expected that the changes are made?

Response [Maximum 100 words]

3.8.4 For hosted solutions, how often, and when, are upgrades/patches usually performed? Please advise of any expected downtime.

Response [Maximum 100 words]

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3.8.5 For hosted solutions, please state the guaranteed percentage(s) of when the system will be available.

Response [Maximum 100 words]

3.9 Contract Management & Reports

3.9.1 Please confirm that, if awarded the purchase order, the Project Manager and/or Contract Manager would be able to attend regular review meetings with the Council. Initially these meetings will be at least monthly; reducing to quarterly once the system is fully operational by mutual agreement.

Response [Maximum 100 words]

3.9.2 List the main reports available for measuring service level performance.

Response

3.9.3 Provide an overview of how the Council would escalate any issues with the overall contract performance.

Response [Maximum 200 words]

3.10 Business Continuity

3.10.1 Does your organisation have a Business Continuity, Disaster Recovery or Risk Management plan?

Briefly describe what key actions your organisation will take to ensure continued provision to customers should there be a major event; for example, should there be adverse weather or a pandemic flu which results in loss of staff, or a fire or utility failure resulting in loss of your servers and/or building.

Response [Maximum 250 words]

3.10.2 Where applicable, does the data centre have a Business Continuity, Disaster Recovery or Risk Management plan?

Briefly describe what key actions the data centre will take to ensure continued provision to customers should there be a major event; for example, should there be adverse weather or a pandemic flu which results in loss of staff, or a fire or utility failure resulting in loss of their servers and/or building.

Response [Maximum 250 words]

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3.11 Quality Assurance

3.11.1 Does the relevant section of your organisation hold a recognised quality management certificate, for example ISO 9001 or equivalent?

If **“Yes”**, please enclose a copy of the certificate

If **“No”**, please list alternative procedures followed to ensure quality is consistently monitored and maintained throughout your organisation.

Response [Maximum 200 words]

3.11.2 Please confirm that your organisation complies with the Council's "ICT Security & Operational Standards Required of Third Party Organisations" (attached as Appendix C). If not, please detail exceptions below.

Response

3.11.3 Does your organisation have ISO/IEC 20000 or similar quality accreditation? Please briefly detail and provide a copy certificate.

Response [Maximum 200 words]

3.11.4 For hosted solutions only, please provide a copy of the ISO/IEC 27001 certification (or equivalent) for the data centre.

This is a Pass/Fail question.

Response

3.12 Customer Interface

3.12.1 Briefly describe how customer software enhancement requirements are collated and implemented. Include details of any forums or user groups.

Response [Maximum 300 words]

3.12.2 What regular communication channels do you use with customers?

Response [Maximum 200 words]

3.13 Pricing

3.13.1 Please complete the Pricing Schedule attached to this ITT as Schedule 6. Please complete two Pricing Schedules if you are tendering for **both** an in-house and externally hosted solutions.

For evaluation purposes the Pricing Schedule is based on the contract maximum of ten years.

Phase II functionality will only be purchased where there are demonstrable business benefits, value for money and budget availability.

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3.13.2 Please briefly explain the licensing model and note any comments on the pricing below.

Information item only – not scored

Response

3.14 Payment

3.14.1 Please confirm acceptance of the staged payment terms detailed in Section E. of the Pricing Schedule.

Response

3.15 Terms and Conditions

3.15.1 Refer to Appendix A1, Software Licence Agreement, for the terms and conditions of contract for an in-house managed system. Please confirm acceptance of all these terms or detail exceptions and any proposed alternatives below, or in a separate document. Significantly non-compliant tenders may be rejected.

Response

3.15.2 Where applicable, Please submit a copy of your organisation's standard hosted services terms and conditions for consideration by the Council. The Council's optimal Service Levels are "Silver" as stated in Appendix B, Example Service Levels.

Response

3.15.3 Please submit a copy of your organisation's standard support/maintenance terms for consideration by the Council. The Council's optimal Service Levels are "Silver" as stated in Appendix B, Example Service Levels.

Response

3.15.4 Please submit a copy of any third party software licence agreement(s) for consideration by the Council.

Response

3.16 Freedom of Information

3.16.1 With reference to Appendix E on the Freedom of Information Action 2000, please complete Schedule 8 – Schedule of Reserved Information.

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3.17 Insurance

3.17.1 The Council requires a minimum of GBP(£)5 million public and product liability cover. Please enclose a copy of your insurance certificate.

This is a Pass/Fail question.

Response

3.17.2 Please provide a copy of your Employer's Liability Insurance certificate. The Council requires a minimum of GBP(£)10 million cover.

This is a Pass/Fail question.

Response

3.17.3 Please provide a copy of your Professional Indemnity Insurance certificate. The Council requires a minimum of GBP(£)2 million cover.

This is a Pass/Fail question.

Response

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SCHEDULE 4 – References

<p>Please provide details of three reference customers, that the Council may visit, that have at least 3 years live system use for local government HR/Payroll data, including teachers.</p> <p>Contracts should have been performed during the past five years.</p> <p>Additionally you will need to send a copy of the Reference Request Form to each of your named contacts, including within the allotted green box, an outline of the contract that you performed for them.</p> <p>The completed form must be returned directly to the Council (HR.Pay@Bracknell-Forest.gov.uk) by the referee by the Tender deadline or it will not be considered.</p>				
		Contract 1	Contract 2	Contract 3
1.	Customer Organisation (name):			
2.	Customer contact name, phone number and email			
3.	Contract title			
4.	Contract start date Contract completion date Contract Value			
5.	Brief description of one of these contracts including evidence as to your technical capability in this market. Please cover both HR and Payroll usage.	<i>[Response – Maximum 500 words]</i>		

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SCHEDULE 5 – Reference Request Form

Refer attached Word Document

SCHEDULE 6 – Pricing Schedule

Refer attached Excel document

SCHEDULE 7 – Outline Specification

Refer attached Word document - please complete, sign and date

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SCHEDULE 8 – Freedom of Information Act 2000 - Schedule of Reserved Information:

Reserved Information	When available for disclosure	Relevant Section of Act	Reason
Tender responses (excl sensitive tender information)	After award of contract	Section 43(2) and/or section 36	Commercial confidentiality and prejudice to the effective conduct of public affairs.
Sensitive tender information received from bidder (e.g. price information)	When no longer sensitive	Section 43(2) and/or section 36 (EIR regulation 12(5))	Sensitive information should not be released. Commercial confidentiality and prejudice to the effective conduct of public affairs.
Information obtained from suppliers and not generally available (future product information, research plans, financial details)	When no longer sensitive	Section 41 (EIR regulation 12(5))	The information will generally have been specifically requested by the authority and supplied with a reasonable expectation it will not be made public. Otherwise, companies may refuse to divulge the information, to the probable detriment of the public interest.
Price breakdown/information	When no longer sensitive	Section 43(2) (EIR regulation 12(5))	
CV's and reference site information	Until exemption does not apply	Section 40 and/or 41 (EIR regulation 12(5) and/or regulation 13)	Personal information or information supplied to the bidder in confidence
Information relating to contract negotiation	When no longer sensitive	Section 43(2) and/or section 36	

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I have read the accompanying "Guidance to Tenderers on Freedom of Information Act 2000: Access to information about or arising under contracts". The above table has been completed in accordance with these guidelines and I have reasonably designated this information as confidential. I understand that the Council will not accept a blanket disclaimer

Name **Job Title**..... **Organisation**.....

Signed..... **Date**.....

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SCHEDULE 9 – Tender Checklist

Please tick checklist to indicate that copies of all relevant documents are enclosed.

<i>Section</i>	<i>Required Documents</i>	<i>Document enclosed Yes/No</i>	<i>Comments</i>
3	Method Statement Questions		
3.1.4	Functional diagram		
3.1.5	Application architecture diagram		
3.1.8	Sample file for Teachers' Pensions		
3.1.10	5 Standard Reports		
3.2.3	Consortia or sub-contracting organisations		
3.2.5	High level project plan		
3.6.1	Outline training plan		
3.11.1	ISO 9001 or equivalent		
3.11.3	ISO 20000 or equivalent		
3.11.4	ISO 27001 or equivalent		
3.15.2	Hosted Services terms and conditions		
3.15.3	Maintenance and Support Agreement		
3.15.4	3 rd Party Software Licence Agreements		
3.17.1	Copy of Public & Product Liability Insurance certificate		
3.17.2	Copy of Employers Liability Insurance certificate		
3.17.3	Copy of Professional Indemnity Insurance certificate		
	Schedules		
1	Entry Level Questions		
2	Organisation Information		
3	Method Statement		
4	References		
5	Reference Request Forms x 3		To be returned directly to the Council by the referees
6	Pricing Schedule		
7	Outline Specification		
8	Schedule of Reserved Information (this		

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	document)		
9	Tender Checklist (this document)		
10	Form of Tender		
	Other – Please List		

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SCHEDULE 10 – Form of Tender

I/We, the undersigned, having examined the Conditions of Contract, Outline Specification and all other Tender Documents, hereby offer to supply the goods/undertake the services required, in accordance with the tender documents for prices detailed in the Pricing Schedule.

I/We understand that the Council is not bound to accept the lowest or any tender received.

This tender remains open for acceptance for 180 days from the date fixed for the submission of tenders in the Invitation to Tender.

I/we agree that the essence of selective tendering is that the Council shall receive bona fide competitive tenders from all those tendering. In recognition of this principle, I/we warrant that this is a bona fide tender, intended to be competitive, and that I/we have not fixed or adjusted the price tendered by, or under or in accordance with any agreement or arrangement with any other tenderer. I/ we furthermore warrant that no approaches have been made to any other tenderers for the purpose of obtaining or influencing their tender prices or any other details of their bid. I/ we also warrant that I/we have not and will not before the award of any contract for the work:

- (i)(a) communicate to any person other than the Council the amount or approximate amount of the tender or proposed tender, except where the disclosure, in confidence, of the approximate amount of the tender was necessary to obtain insurance premium quotations required for the preparation of the tender;
- (b) enter into any agreement or arrangement with any person that they shall refrain from tendering, or that they shall withdraw any tender once offered or vary the amount of any tender to be submitted;
- (ii) pay, give or offer to pay or give any sum of money or other 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 or proposed tender for the work, any act or thing of the sort described at (i)(a) or (b) above.

Unless and until a formal agreement is prepared and executed, this tender, together with your written acceptance thereof, shall constitute a binding contract between us.

Signature

(please use non black ink)

Name

Job Title

Organisation

Address

☎ Telephone No.(s)

Email

Date

ORGANISATION NAME:

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