



FOREST HILL SCHOOL
ASPIRING TO EXCELLENCE TOGETHER

Forest Hill School

QUALIFYING QUESTIONNAIRE

V1.0

ICT Managed Service

**To be completed and returned with supporting documents by
Midday on the 5th November 2021**

To: Mrs Samantha Davies

E-mail to s.davies@foresthillschool.co.uk

To: Mr Geoff Chandler

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

Electronic Submission will be acceptable at this Stage

BASIS AND CRITERIA FOR ACCEPTANCE
ICT Managed Service Tender
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 School's requirements to be considered for inviting to tender. Any items where the School 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.

These responses will be ranked by the School and a minimum of the top 5 companies shall form the basis of the shortlist of companies invited to tender for a 3-year ICT 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 CC s.davies@foresthillschool.co.uk or by telephone 07970 661087. The closing date for applicants to submit questions is 5pm on the 15th October 2021. The school will provide an electronic response to all questions and to all applicants who have expressed an interest by 5pm on the 19th October 2021 **or before.**

Completed Qualification Questionnaires, with all relevant additional information, must be submitted to the School by **Midday on the 5th November**. 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 invited to receive the ITT for Forest Hill School

Background

Forest Hill School (FHS) is an aspirational comprehensive school in south east London providing education to boys aged 11-18. The school also work with Sydenham School to provide 6th form education for both male and female students.

We consider our 6th form the best place for post-16 study in the borough. This is exemplified by a year-on-year increase in the number of pupils progressing to Russell Group universities and other prestigious institutions, and an enviable record of young people moving on to study at Oxford and Cambridge.

We also believe that students achieve their full potential if they enjoy their work and find it stimulating and challenging. Forest Hill School offers a curriculum of great breadth that includes Dance, Drama, Art and Music alongside the traditional academic subjects.

A total of 1,255 pupils attend FHS of which circa 250 attend the 6th form.

The school website is <https://foresthill.lewisham.sch.uk>

FHS school are currently supported by an onsite team of:

- 1 full-time Network Manager
- 1 part time apprentice (50%)

from an outsourced provider who also provide a service desk and remote monitoring/support etc

There is no expectation that in the life time of the contract the school will become part of a Multi-Academy Trust or become a single school MAT then add other schools.

Further, this procurement is for FHS only and not Sydenham school – In terms of ICT the only link is through the MIS system.

Going forward - This procurement

This procurement encompasses a full outsource of the ICT service for the School to a single supplier.

Further details regarding timescales are noted below but in summary this is advertised as a maximum 3 year service with start and end dates as follows:

- Service start date – 1st April 2022
- Service end date – 31st March 2025

The companies identified from these shortlisting questions to receive the ITT will then receive a detailed set of requirements. For the purposes of this shortlisting stage bidders should assume that the ITT will include all equipment and service regarding ICT, including but not be limited to;

- strategic advice and direction to the School regarding ICT
- a core 40-week service
- service desk
- local staffing that bidders deem necessary to deliver the SLA
- responsibility for design, specification, installation and management of all ICT infrastructure
- supply of goods and services based on an agreed Best Value (BV) approach
- management of all ICT against an agreed SLA
- management of 3rd parties
- relevant monitoring, management, patching and reporting
- training – technical and curriculum as necessary
- expectation that the provider will drive innovation
- risk registers and inventory management
- collective partnership targets regarding support for e.g. support for ICT in the community

Bidders should note the following;

- The reason for this tender is due to the fact that the existing outsourced contract is due to expire.
- We expect TUPE to apply from both the existing supplier.
- The school is a PFI building and as such an interface matrix will be part of the contract which will define responsibilities regarding ICT Infrastructure.

At a high level the FHS estate of devices encompasses some 600 devices and other technology. Bidders should not assume more detail on this will be provided at ITT Stage.

Further details and more detailed information about the network solution will be provided to those bidders who are shortlisted to receive the ITT

The value of this procurement has been set with an upper limit of **£355,000** over a 3-year period.

This includes the following:

- Cost of Managed Service
- Refresh of equipment

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.

- a. 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).
- b. Contractor Track Record - contractors must be able to demonstrate a successful track record of providing similar works to those envisaged.
- c. 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 School reserves the right to reject/disqualify any application that is incomplete or non-compliant.

Stage 2

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

Economic and financial standing

1. Evidence of economic and financial standing in respect of viability to perform the services including the submission and evaluation of three years of detailed financial accounts, the latest not more than 18 months old. **Pass/Fail**
2. Suitable insurance cover. Public Liability to a minimum of £5,000,000 per occurrence, Employer's Liability to a minimum of £10,000,000 (or statements that these will be obtained if awarded the relevant contract(s)). **Pass/Fail**
3. A sound record of and clear policies of quality standards including, health & safety, e-safety, safeguarding & GDPR and equality. **Pass/Fail**

Technical capacity

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

The School 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 School 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.

| Activity | Dates |
|--|--|
| SQ available | 8 th October |
| SQ Clarifications open | 8 th October |
| SQ Clarifications close | 15 th October |
| Latest date for last clarification responses | 19 th October |
| SQ Submission date | 5th November |
| Indicative Timescales | |
| SQ Shortlisting announced to bidders | 10 th November |
| ITT Stage meeting for shortlisted bidders | 16th November |
| Issue of ITT | 16 th November |
| Clarifications open | 16 th November |
| Clarifications close | 3 rd December |
| Latest date for last clarification responses | 8 th December |
| ITT Submission | 14th December |
| Bidder presentations (All bidders will be invited to present) | 17 th December |
| School Authorisation Process | Early January |
| Award decision notice sent to bidders | 17 th January |
| Alcatel Period | 10 days |
| Contract finalisation with preferred bidder | By end of January |
| Transition period begins Inc TUPE Consultations (if necessary) | End Jan to 31 st March 2022 |
| Service Starts | 1 st April 2022 |

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

ICT Service
Initial Selection QUESTIONNAIRE

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

Supporting documents should be included where applicable.

| Section A - 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 <i>(if applicable)</i> | Mandatory Response |
| 1.1 (b) - (ii) Registered website address <i>(if applicable)</i> | |
| 1.1 (c) Please check the relevant box to indicate your trading status | i) a public limited company <input type="checkbox"/> Yes |
| | ii) a limited company <input type="checkbox"/> Yes |
| | iii) a limited liability partnership <input type="checkbox"/> Yes |
| | iv) other partnership <input type="checkbox"/> Yes |
| | v) sole trader <input type="checkbox"/> Yes |
| | vi) third sector <input type="checkbox"/> Yes |
| | vii) other (please specify) <input type="checkbox"/> Yes |
| 1.1 (d) Date of registration in country of origin | Mandatory Response |
| 1.1 (e) Company registration number <i>(if applicable)</i> | Mandatory Response |
| 1.1 (f) Charity registration number <i>(if applicable)</i> | Mandatory Response |
| 1.1 (g) Head office DUNS number <i>(if applicable)</i> | |
| 1.1 (h) Registered VAT number | |
| 1.1 (i) - (i) If applicable, is your organisation registered with the appropriate professional or trade | <input type="checkbox"/> Yes |
| | <input type="checkbox"/> No |

| | | |
|--|---|------------------------------|
| register(s) in the member state where it is established? | <input type="checkbox"/> Not 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? | <input type="checkbox"/> Yes <input type="checkbox"/> 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 (l) Please check the relevant boxes to indicate whether you fall within any of these classifications | i) Voluntary, Community and Social Enterprise (VCSE) | <input type="checkbox"/> Yes |
| | ii) Sheltered workshop | <input type="checkbox"/> Yes |
| | iii) Public service mutual | <input type="checkbox"/> Yes |
| 1.1 (m) Are you a Small, Medium or Micro Enterprise (SME) ¹ ? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| 1.1 (n) Details of Persons of Significant Control (PSC), where appropriate ² : - Name; - Date of birth; - Nationality; - Country, state or province where the 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 FHS; | <input type="checkbox"/> Not Applicable | |

¹ See EU definition of SME https://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en

| | |
|--|---|
| <ul style="list-style-type: none"> - Over 25% up to (and including) 50%, - More than 50% and less than 75%, - 75% or more³. | |
| <p>1.1 (o) Details of immediate parent company:</p> <ul style="list-style-type: none"> - Full name of the immediate parent company - Registered office address (<i>if applicable</i>) - Registration number (<i>if applicable</i>) - Head office DUNS number (<i>if applicable</i>) - Head office VAT number (<i>if applicable</i>) | <div style="background-color: #00FFFF; width: 50px; height: 15px; margin-bottom: 5px;"></div> <input type="checkbox"/> Not Applicable |
| <p>1.1 (p) Details of ultimate parent company:</p> <ul style="list-style-type: none"> - Full name of the ultimate parent company - Registered office address (<i>if applicable</i>) - Registration number (<i>if applicable</i>) - Head office DUNS number (<i>if applicable</i>) - Head office VAT number (<i>if applicable</i>) | <div style="background-color: #00FFFF; width: 50px; height: 15px; margin-bottom: 5px;"></div> <input type="checkbox"/> Not Applicable |
| <p>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.</p> | |

| | |
|---|--|
| <p>Section A - Bidding model</p> | |
| <p>Please check the relevant box to indicate whether you are;</p> | |
| <p>1.2 (a) - (i) Are you bidding as the lead contact for a group of economic operators?</p> | <input type="checkbox"/> Yes <input type="checkbox"/> No <p>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.</p> <p>If no, and you are a supporting bidder please provide the name of your group at 1.2 (a) (ii)</p> |

| | |
|--|---|
| | for reference purposes, and complete 1.3, Section 2 and 3. |
| 1.2 (a) - (ii) Name of group of economic operators <i>(if applicable)</i> | ██████████ |
| 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? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| <p>1.2 (b) - (ii) If you responded “Yes” in 1.2 (b) – (i), please provide additional details for each sub-contractor in the following table: we may ask them to complete this form as well.</p> <p>Name ██████████</p> <p>Registered Address ██████████</p> <p>Trading status ██████████</p> <p>Company registration number ██████████</p> <p>Head Office DUNS number <i>(if applicable)</i> ██████████</p> <p>Registered VAT number ██████████</p> <p>Type of organisation ██████████</p> <p>SME <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>The role each sub-contractor will take in providing the supplies e.g. key deliverables ██████████</p> <p>The approximate % of contractual obligations assigned to each sub-contractor ██████████</p> | |

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 | | |
|--|---|--------------------------------|
| <p>2.1 (a) Regulations 57(1) and (2)</p> <p>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.</p> <p>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 <u>webpage</u>.</p> | <p>Please indicate your selection:</p> | |
| <p>(i) Participation in a criminal organisation.</p> <p>If Yes, please provide details at 2.1(b)</p> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <p>(ii) Corruption.</p> <p>If Yes, please provide details at 2.1(b)</p> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <p>(iii) Fraud.</p> <p>If Yes, please provide details at 2.1(b)</p> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <p>(iv) Terrorist offences or offences linked to terrorist activities</p> <p>If Yes, please provide details at 2.1(b)</p> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <p>(v) Money laundering or terrorist financing</p> <p>If Yes, please provide details at 2.1(b)</p> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <p>(vi) Child labour and other forms of trafficking in human beings</p> <p>If Yes, please provide details at 2.1(b)</p> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <p>2.1 (b) If you have answered yes to question 2.1(a), please provide further details.</p> <p>Date of conviction, specify which of the grounds listed the conviction was for, and the reasons for conviction,</p> <p>Identity of who has been convicted</p> | | |

If the relevant documentation is available electronically please provide the web address, issuing authority, precise reference of the documents.



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 details. Please also confirm you have paid, or have entered into a binding arrangement with a view to paying, the outstanding sum including where applicable any accrued interest and/or fines.



Please Note: The School 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:

Name of organisation [REDACTED]

Relationship to the Supplier completing these questions [REDACTED]

| | | |
|---|---------------------------------|--------------------------------|
| 3.1 Are you able to provide parent company accounts if requested to at a later stage? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3.2 If yes, would the parent company be willing to provide a guarantee if necessary? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3.3 If no, would you be able to obtain a guarantee elsewhere (e.g. from a bank)? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Data Protection

Requirements under the General Data Protection Regulation and Data Protection Act 2018

4.1 Are you registered with the UK Information Commissioners Office?
If yes, please provide your registration number –

| | |
|---------------------------------|--------------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|---------------------------------|--------------------------------|

4.2 Please state your overall approach towards the EU General Data Protection Regulation and UK Data Protection Act 2018

[REDACTED]

4.3 What is your data retention policy and rules

[REDACTED]

4.4 Access controls and information – what is your policy on access controls? Can you provide evidence of certification or adopting codes of practice?

[REDACTED]

4.5 Do you use any subcontractors to deliver the service? If so, how do you select them and obtain assurances on the data protection and information security practices?

[REDACTED]

4.6 What contractual measures do you have in place to ensure personal data is processed compliantly and securely by sub-contractors?

■■■■

4.7 Do you have an incident management process that includes effective management of data security incidents? What is the process for managing personal data security incidents?

■■■■

4.8 Training and awareness for staff and contractors – what data protection and information security training and awareness raising is in place?

■■■■

Section C - School Specific Questions / Evidence

5.1 Key Personnel

Please name the key personnel who would be involved in this contract if your company were to be awarded the contract, and outline their technical qualifications and length of relevant experience

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5.2 Accounts

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

The School will apply its financial tests to your accounts including the requirement that turnover should be at least four times the annual value of the advertised contract.

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.

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5.4 Insurance

The School requires all of its contractors to maintain:

- (a) Employer's Liability insurance to a minimum value of £10,000,000;
Proof of insurance Enclosed? **YES** **NO** If not, explain why?
- (b) Public Liability insurance to a minimum of £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

- (a) Please enclose a copy of your Health and Safety Policy (covering General Policy, Organisation and Arrangements) and any codes of safe work practices issued to employees.
Enclosed? **YES** **NO**
- (b) Please enclose details of prosecutions or notices served on your firm by the Health and Safety Executive (or otherwise) in the last three years
Enclosed? **YES** **NO** **N/A**

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;
- (b) requirements for employees to disclose criminal convictions; and
- (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/GDPR
- (b) E-safety & Safeguarding
- (c) Requirement to undertake Enhanced DBS check for staff attending school sites

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

5.8 Your Company

Please provide an overview of your company including any relevant partnerships and associations

??

**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 ***ICT Managed Services and the implementation of ICT Projects to the Education sector relating, where possible, to the sort of environment that FHS is tendering for.***

Please use and add extra sheets if required.

REFERENCES

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

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

Referee 1

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

Referee 2

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

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 |