



Student Planner

Invitation to Tender

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## 1. Introduction

### 1.1 About the Trust

Students First: raising standards and transforming lives.

#### Context and Background

Outwood Grange Academies Trust (OGAT) is a not for profit sponsor of primary and secondary academies and is recognised nationally as one of the highest performing chains of schools, is the highest performing family of schools in the North of England and a System Trust working directly to the National Schools Commissioner. We developed our educational blueprint from many years of leading and supporting schools and have used this to sponsor academies; having a transformational effect on children's life chances within very quick timescales.

All academies within our trust work closely with each other as a 'family of schools'. Indeed, each academy individually and collectively forms the trust: the trust as a whole is not a separate body or group of people but rather one single organisation made up of all our academies with one single vision and shared set of values.

Together we all work to ensure that all children, irrespective of their starting point, receive an excellent education. We relish the opportunity to be part of the much needed regeneration of the areas we work in.

To further reinforce our single vision, we would like to work with an external partner to deliver a trust wide student planner for our secondary schools. The secondary planner will be mostly generic with a small provision of bespoke information specific to each academy.

Any schools joining the OGAT family of schools in the future would also need provision of the planner.

The initial order of planners would need to be delivered directly to each individual academy during the week commencing Monday 18 June 2018.

#### Obtaining a Supplier

In order to secure best value for money for the tax payer, OGAT has a clear scheme of delegation for procuring services. In this instance, in order to secure a supplier, OGAT must demonstrate that the successful supplier will offer the most economically advantageous tender.

The financial regulations of OGAT require Outwood academies to carry out a tendering process for orders expected to be in excess of £25,000 in value, and where timescales are an important factor.

It is envisaged that the successful supplier will then enter in to an agreement where OGAT will purchase a significant number of student planners for 2018. It is envisaged that the contract will be for an initial one-year period with the option to extend for a further two years.

Further details of the Trust can be found on our website: [www.outwood.com](http://www.outwood.com)

### 1.2 About This Tender

The Trust is seeking a single supplier of student planners.

The Trust intends to award a contract for an initial one-year period with the option to extend for a further two years.

The preferred supplier will be appointed in March 2018 to begin their contract immediately.

### **1.3 Overview of Requirements**

The provider will agree and provide: -

Student Planners as per Appendix A.

### **1.4 Objective of Tender**

The Trust wishes to achieve the following objectives following this tender process:

- Appoint a single provider of secondary student planners across the Trust
- Ensure the Trust are achieving excellent value for money

### **1.5 Instructions to Tenderers**

It is ESSENTIAL that all suppliers submitting a proposal read all of the instructions in this section very carefully and comply with all of them. Failure to do so may result in suppliers being excluded from the tender process.

#### **1.5.1 Queries Relating to the Tender**

If tenderers have queries regarding the Invitation to Tender they should be submitted in writing to Kelly Furniss, Procurement Manager [k.furniss@outwood.com](mailto:k.furniss@outwood.com). Queries should be submitted no later than one week prior to the tender closing. Any queries received later than this may not be responded to in time. If the answer contains information of material significance those answers will be communicated to all companies involved in the tender process.

#### **1.5.2 Response Format**

One of the major issues when evaluating large tenders is being able to accurately compare each company's proposal. To ensure this process is as straightforward as possible all of your responses will need to be submitted in a prescribed format.

The Trust, therefore, requires the following information within your tender to be provided on the templates provided in the appendices to this document:

#### **1.5.3 Completion of Tenders**

Tenders must be submitted in accordance with all instructions contained within this document. Please read the Invitation to Tender document very carefully and answer all questions asked and provide all of the required information in sufficient detail to allow the project team to make an informed decision. Failure to comply with these instructions will result in your tender being marked down and could result in your expulsion from the process.

#### 1.5.4 Return of Tender Documents

Completed tender submissions must be received by the Trust no later than Friday 12<sup>th</sup> March 2018 and should be emailed to:

k.furniss@outwood.com

The tender submission must be provided in an electronic format. The electronic copy of your tender response must be provided in either PDF format, MS Word or MS Excel or a combination of the above. Images (e.g. copies of certification etc.) can be supplied in PDF or JPG format.

Your tender submission must not be e-mailed to any member of Trust's staff prior to the Tender Submission Date.

Paper submissions will NOT be accepted.

#### 1.6 Freedom of Information

The Freedom of Information Act (FOIA) 2000 applies to all information held by public bodies.

Outwood Grange Academies Trust is a designated body under the FOIA, and subject to the disclosure requirements and therefore all of the information the Trust holds about a company is potentially covered by the FOIA. Examples of the types of information which are within the scope of the legislation include:

- Information which we might gather in the run up to a procurement exercise.
- Information provided by prospective suppliers as part of the tendering process.
- Contracts and associated documents, such as the correspondence connected with negotiating a contract.
- Information supplied by the contractor during the delivery of a contract, and information relating to our monitoring of the contract.

Requests for this type of information have to be handled like any other FOIA request and therefore must be provided unless a valid exemption applies.

#### 1.7 Award Criteria

The Trust will select a supplier based on the most economically advantageous tender, not necessarily the lowest price. The following criteria will be used to appoint a preferred supplier.

Criteria	Marks
Price	50
Ability to deliver within required timescales	25
Ability to meet exact specification	25

## **1.8 Evaluation**

The Trust will be selecting a supplier using the Most Economically Advantageous Tender methodology.

## **2. Specification**

As per Appendix A.

### **2.1 Business Requirements**

Should an urgent issue with supplied products occur, the Trust would expect to meet to discuss within 3 working days.

### **2.2 New Academy Engagement**

The Trust has grown steadily over the last 7 years and this growth may continue in the future. The supplier will need to explain how they will manage the engagement and 'on boarding' of any new academies joining the Trust and provide estimated timeframes for this work.

### **2.3 Contract Duration**

The contract duration will for an initial one-year period with the option to extend for a further two years. The extension would be dependent on the performance of the chosen supplier during the initial one-year contract term and will be granted at the sole discretion of the Trust.

### **2.4 Invoicing**

Invoicing and delivery will be required to each individual academy.

### **2.5 Payment Terms**

The Trust's payment terms are 30 days from date of invoice.

## **3. Pricing**

### **3.1 Pricing Structure**

As per Appendix B.

### **3.2 Additional Costs**

As part of their submission suppliers should outline any other additional costs that might be charged to the Trust.

### **3.3 Pricing Template**

The Trust has provided a template (Appendix B) in which suppliers should submit their price per academy plus any costs for the provision of the service required by the Trust. This template must not be adapted or amended in any way. If a bidder finds that they cannot provide all of the information they wish to as the template does not allow this, they must contact the Trust immediately so that the template can be adapted if necessary.

## **4. Your Proposal**

To ensure simple comparison of bids it is essential that each supplier provides all of the information requested by the Trust in the format in which it is requested. Therefore, bidders must read the instructions contained within this section very carefully to ensure they provide their submission in the required structure.

### **4.1 Appendices to Supplier Proposals**

Bidders may wish to provide additional information over and above that they have provided in the two templates. If this is the case, then the information can be presented in an appendix. Any appendices must be very clearly referenced so that the Trust's project team can find them quickly and easily. If the referencing is not clear and the appendices are difficult to locate then the project team may not be able to review the submission properly.

Any appendices must be entitled Appendix A, Appendix B etc. rather than Appendix 1, Appendix 2 etc. This is to ensure there is no confusion between the appendices provided by the Trust in this Invitation to Tender and those provided by the supplier in their submission.

## Appendix A – Print / Production Specification

- Artwork:

Will be supplied as print ready pdf files and/or native Adobe InDesign files

- Size: A5

- Clear polyprop protective cover

- Designed cover:

2pp cover printed in full colour to one side only on 300gsm card (there will be a space to write names/numbers etc. on outer cover) - *generic across all academies*

- Inner:

All printed on 90gsm/100gsm white stock

Front sections:

16pp full colour & 1 colour (Pantone 2597) - *bespoke to each academy*

16pp full colour & 1 colour (Pantone 2597) - *generic across all academies*

Diary section:

96pp 1 colour (Pantone 2597) - *generic across all academies*

Back section (TWO OPTIONS):

Option 1. 32pp full colour & 1 colour (Pantone 2597) - *generic across all academies*

Option 2. 48pp full colour & 1 colour (Pantone 2597) - *generic across all academies*

Total inner pages: 160 (16 bespoke, 144 generic) or 176 (16 bespoke, 160 generic)

- Additional features:

Learning signals - red, yellow/amber and green boards bound in at the back of the planner pages - *generic across all academies*

- Back cover:

2pp back cover printed in black to one side only (outer) on 300gsm card and laminated to both sides to use as a white board - *generic across all academies*

- Clear plastic wallet bound in

- Clear polyprop protective cover

- Binding:

Spiral bound with locking metal wire (please indicate clearly if you will be using another form of binding)

- Additional finishing:

Rounded outer corners to prevent dog-earing

- Notes:

The quantities are based on the number of students at each school plus consideration for spares. As there is inherently the possibility of students losing planners, new students joining the existing academies, and new schools joining the family of schools, we would envisage potential orders part way through the year.

- Delivery:

To be delivered to each school individually during week commencing Monday 18 June 2018.

A full list of academies, delivery addresses and quantities can be found on Appendix B.

## Appendix B – Secondary Student Planner

Academy and delivery address	Indicative quantities
Outwood Academy Acklam Hall Drive, Acklam, Middlesbrough, TS5 7JY	1400
Outwood Academy Adwick Windmill Balk Lane, Woodlands, Doncaster, DN6 7SF	1250
Outwood Academy Bishopgarth Harrowgate Lane, Stockton-on-Tees, TS19 8TF	800
Outwood Academy Brumby Cemetery Road, Scunthorpe, North Lincolnshire, DN16 1NT	1000
Outwood Academy Bydales Coast Road, Marske-by-the-Sea, Redcar, TS11 6AR	1050
Outwood Academy Carlton Royston Lane, Barnsley, S71 3EW	1650
Outwood Academy City Stradbroke Road, Sheffield, S13 8SS	1600
Outwood Academy Danum Armthorpe Road, Doncaster, DN2 5QD	1400
Outwood Academy Easingwold York Road, Easingwold, York, YO61 3EF	800
Outwood Academy Foxhills Foxhills Road, Scunthorpe, DN15 8LJ	1000
The Freeston Academy Favell Avenue, Normanton, West Yorkshire, WF6 1HZ	850
Hemsworth Arts and Community Academy Wakefield Road, Pontefract, West Yorkshire, WF9 4HW	1150
Outwood Grange Academy Potovens Lane, Outwood, Wakefield, WF1 2PF	2500
Outwood Academy Newbold Highfield Lane, Chesterfield, S41 8BA	950
Outwood Academy Ormesby Tothill Avenue, Netherfields, Middlesbrough, TS3 0RH	1000
Outwood Academy Portland Netherton Road, Worksop, S80 2SF	1800
Outwood Academy Redcar Kirkleatham Lane, Redcar, TS10 4AB	700
Outwood Academy Ripon Clotherholme Road, Ripon, HG4 2DE	850
Outwood Academy Shafton Engine Lane, Shafton, Barnsley, S72 8RE	1800
Outwood Academy Valley Valley Road, Worksop, S81 7EN	1900
Wakefield City Academy Warmfield View, Wakefield, West Yorkshire, WF1 4SF	850
<b>Total</b>	<b>26,300</b>

<b>Option</b>	<b>Indicative quantities</b>	<b>Planner unit cost Year 1</b>	<b>Planner unit cost Year 2</b>	<b>Planner unit cost Year 3</b>
<b>Option 1</b> 160pp (16 bespoke, 144 generic)	<b>26,300</b>			
<b>Option 2</b> 176pp (16 bespoke, 160 generic)	<b>26,300</b>			

Company Number:

Copy of latest financial accounts submitted

(Credit rating scores may be obtained by the trust)

Samples of planners may be requested following tender submission.

## Appendix C – Response to Tender

### Secondary Student Planner

- 1 We, \_\_\_\_\_ (Name(s) in Block Letters) hereby offer and undertake on the acceptance of this tender to supply goods and services as specified in the Requirements Specifications under Part 2 of your Invitation to Tender and under the Instructions to Tenderer and Conditions of Contract in Part 1 of your Invitation to Tender.
- 2 Our Tender is fully consistent with and does not contradict or derogate from anything in Part 1 of your Invitation to Tender or downgrade anything in your Requirement Specifications. You are entitled to reject our tender if it is inconsistent with or contradict or derogate from anything in Part 1 of your Invitation to Tender or downgrade anything in Part 2 of your Invitation to Tender.
- 3 We undertake that we shall as and when required by you to execute with you a formal agreement in the appropriate form incorporating the Conditions of Contract set out in this Invitation to Tender together with such further terms and conditions, if any, agreed between Outwood Grange Academies Trust and the bidder. Until the said formal agreement is prepared and executed, this offer together with your written acceptance thereof, shall constitute a binding agreement between us.
- 4 OUR OFFER IS VALID FOR \*\*\*\*\* CALENDAR DAYS FROM THE CLOSING DATE OF THIS TENDER.
- 5 Our price (herein referred to as "the Contract Price") for the goods and services to be supplied by us is \_\_\_\_\_.
- 6 A breakdown of the Contract Price for the goods and services is given in the priced schedule attached hereto.
- 7 We further undertake to give you any further information which you may require.
- 8 We warrant, represent and declare that we are duly authorised to submit, sign this tender, receive instruction, give any information, and accept any contract and act for and on behalf of \_\_\_\_\_ (Insert Name of company).

Authorised	Signature
Name :	
Designation :	
Dated this _____ day of _____, 20_____	

**NOTICE:** This Form duly completed MUST accompany every Tender Proposal. Any change to its wordings may render the Tender liable to DISQUALIFICATION