

Dear Tenderer

INVITATION TO TENDER (ITT) for the Provision, installation and Commissioning of 5 Manual lathes, Milling Turrets and associate tooling and equipment in accordance with the detailed specification contained within this document.

1. Your organisation along with others is invited to offer a tender for provision of the above, to the specification outlined in the attached documents. Enclosed are:

Document 1	Instructions and information on the tendering procedures.
Document 2	Specification of the Requirement.
Document 3	List of attachments.
Document 4	Declaration and information to be provided by tenderer.

2. Please read the instructions on the tendering procedures carefully. Failure to comply with them may invalidate your tender which must be returned by the date and time given below.
3. Your tender must be received electronically by Louise Green, Finance Director no later than 6:00pm on 30th November 2023. All tenders must be sent to tenders@wmgacademy.org.uk. Any tender submissions submitted to any other email address associated with the academy will not be considered and any late tenders will not be considered.
4. If you have read the enclosed specification and you decide not to submit a tender, I would be grateful if you could send your reasons (though you are under no obligation to do so) to Louise Green at the following email address: finance@wmgacademy.org.uk. Please title the subject "No Tender".
5. Please contact Louise Green at finance@wmgacademy.org.uk if you wish to raise any tender queries regarding the specification or if you have any questions about the tendering procedure. The enclosed Document also contains details for providing you with further information or clarification of the Academy's requirement.

I look forward to your response.

Yours sincerely

Louise Green
Finance Director
WMG Academy for Young Engineers

DOCUMENT 1

1. INSTRUCTIONS AND INFORMATION ON TENDERING PROCEDURES

These instructions are designed to ensure that all tenders are given equal and fair consideration. It is important therefore that you provide all the information asked for in the format and order specified. Please contact the finance team (finance@wmgacademy.org.uk) if you have any doubts as to what is required or you have difficulty in providing the information requested. Pre-tender negotiations are not allowed.

2. Contract Period

The contract is for the supply of equipment as detailed in Document 2 below plus a 4 year annual service agreement to commence on the first anniversary of the agreed completion date of the installation of the equipment. Thereafter the service agreement will be reviewed annually or whatever time interval is deemed appropriate by both parties. The estimated total spend for the contract period is £250,000 excluding VAT.

3. Incomplete Tender

Tenders may be rejected if the information asked for in the ITT and Specification is not given at the time of tendering.

4. Returning Tenders

All tenders should be marked FAO Louise Green and submitted electronically to tenders@wmgacademy.org.uk by the deadline as noted in the timeline below. The academy will send a confirmation of receipt of the bid by email once the deadline has passed. Tender submissions will be accepted up to **6.00pm (GMT) on 30th November 2023**.

5. Receipt of Tenders

Tenders will be received up to the time and date stated. Those received before the due date will be retained unopened until then. It is the responsibility of the tenderer to ensure that their tender is delivered not later than the appointed time and date given.

6. Acceptance of Tenders

By issuing this invitation the Academy is not bound in any way and does not have to accept the lowest of any tender, and reserves the right to accept a portion of any tender, unless the tenderer expressly stipulates otherwise in their tender.

7. Inducements

Offering an inducement of any kind in relation to obtaining this or any other contract with the Academy will disqualify your tender from being considered and may constitute a criminal offence.

8. Confidentiality of Tenders

Please note the following requirements, you must not:

- Tell anyone else what your tender price is or will be, before the time limit for delivery of tenders.

- Try to obtain any information about anyone else's tender or proposed tender before the time limit for delivery of tenders.
- Make any arrangements with another organisation about whether or not they should tender, or about their or your tender price.

Failure to comply with these conditions may disqualify your tender.

9. Costs and Expenses

You will not be entitled to claim from the Academy any costs or expenses which you may incur in preparing your tender whether or not your tender is successful.

10. Debriefing

Following the award of contract, debriefing will be included in the letter sent to unsuccessful tenderers.

11. Evaluation Criteria

The tender process will be conducted in a manner that ensures tenders are evaluated fairly to ascertain the most economically advantageous tender (MEAT).

Your capability to perform the contract will be evaluated using the award criteria as set out in Annex 1, at the end of this document.

12. Freedom of Information

The Academy is committed to open government and to meeting their responsibilities under the Freedom of Information Act 2000. Accordingly, all information submitted to the Academy may need to be disclosed in response to a request under the Act. If you consider that any of the information included in your tender is commercially sensitive, please identify it and explain (in broad terms) what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity. You should be aware that, even where you have indicated that information is commercially sensitive, we may still be required to disclose it under the Act if a request is received. Please also note that the receipt of any material marked 'confidential' or equivalent by the Academy should not be taken to mean that we accept any duty of confidence by virtue of that marking. If a request is received, we may also be required to disclose details of unsuccessful tenders.

13. Tender Period

Due to the intensive evaluation process, the Academy requires tenders to remain valid for the period specified in Document 4.

14. Basis of the Contract

The specification in Document 2, and the attachments listed in Document 3, together with any special requirements, will form the basis of the contract between the successful tenderer and the Academy.

15. Timetable

This timetable is provisional and may be subject to change, but will be adhered to by the Academy as far as reasonably possible.

ACTIVITY	TIMESCALE
Open tender advertised through FTS portal	1st November 2023
Start of clarifications stage / any questions about the specification or procurement process	1st November 2023
End of clarifications stage	24th November 2023
Submission deadline for receipt of bids	6pm 30th November 2023
Supplier clarification interview if required upon request (via TEAMS call).	15 th – 22 nd November
Inform tenderers of award	21st Dec 2023
Award contact	8 th January 2024

16. Format of Bids

Tenderers should present their proposals in the following format using the “Tender Submission” document provided:

- Section 1** - Company details
- Section 2** - Requirement
- Section 3** - Project Delivery / Installation and Commissioning (add attachment – “Equipment Country of Origin delivery time scales and installation”)
- Section 4** - Meets Educational Needs
- Section 5** - Insurance
- Section 6** - Health and safety including safeguarding
- Section 7** - Value for money
- Section 8** - Costs - (add attachment – “Equipment and service pricing”)

17. Conclusion

Whilst every endeavour has been made to give tenderers an accurate description of the Academy's requirement, tenderers should make their own assessment about the methods and resources needed to meet those requirements.

SPECIFICATION OF REQUIREMENT

1 Background

Launched in September 2020, T Levels are new 2-year courses which are taken after GCSEs and are broadly equivalent in size to 3 A Levels. These courses have been developed in collaboration with employers and education providers so that the content meets the needs of industry and prepares students for entry into skilled employment, an apprenticeship or related technical study through further or higher education.

WMG Academy for Young engineers is a 14 - 19 school with a specialism in engineering and are currently running a T Level in Engineering Manufacture, Process and Control. As part of the delivery of the curriculum the students will undertake a range of practical and machining tasks in our workshop. WMG Academy Trust is looking to invest in creating a practical learning environment that is industry standard and leading nationally in the delivery of vocational education for the next decade.

2 Purpose

The purpose of the Tender is to renew and upgrade current equipment and technology in the Coventry site for WMG Academy for Young Engineers to bring the facilities in line with industry standard equipment and to future proof the facilities to enable the academy to deliver a world class T Level curriculum.

The Tender will set out in the specification the need to deliver and install manual lathes and milling machines within the Engineering hall, alongside a CNC lathe and a CNC milling machine. Training for staff will also be a requirement along with the annual servicing of the equipment installed for future years.

3 Security of Data

Not used.

4 Cost

Please give a detailed breakdown of costs (excluding VAT) ensuring that costs for the following items are included in the tender. You must use the format in the table in the Excel tender submission document provided.

5.1 Product and Service Specification

Name	Notes/Description	QTY	Unit cost	Total
Manual lathe				
Supply and installation of Student / trainer manual centre lathes	<ul style="list-style-type: none"> • multi speed Gearbox • minimum 750mm travel between Centres • 150mm 3 Jaw Chuck • Digital readout. • Quick release tool posts. • Tail stock included • Guarding • Work light • thread cutting • Auto feed on x and y axis • Full length foot brake • Metalworking fluid enabled • All guardian and e stops to meet BS 4163/2021 	5		
200mm 4 Jaw Chuck		2		
300mm face plate		1		
460mm face plate		1		
200mm face plate		1		
Revolving Centre Tipped 60 Deg		5		
Dead centre 60 deg		5		
Keyless jacobs drill chuck and arbour to fit tailstock		5		
3 point stationary Lathe steady with roller ends		2		
2 point Lathe steady travelling with roller ends		2		
Telescopic taper turning attachment		1		
Manual Mill				
Supply and installation of (3 Axis) Manual vertical Turret Mill, R-8 quill	<ul style="list-style-type: none"> • Digital Readout • minimum 660mm X 305mm X 400mm (X/Y/Z Axis Travel) • Minimum 1069mm X 228mm Table size • Guarding • Work light • Metal working fluid enabled • Auto feed on all axis 	2		

	<ul style="list-style-type: none"> All guardian and e-stops to meet min BS4163/2021 			
ER 32 Collet Chuck Set to fit.		2		
R-8/ER collet holders + wrench		4		
Set of ER32 collet chucks		1		
Keyless drill chuck and arbour R-8		2		
8" swivelling tilting vice		2		
8" machine vice		2		
Rotary table with chuck		2		
Quill clamp for dti		2		
Clamp kit		2		
CNC Lathe				
Supply and installation of CNC Lathe.	<ul style="list-style-type: none"> Integrated Control system minimum of 1,000mm Between Centres minimum 200mm 3 Jaw Chuck Multi speed control (RPM) Digital readout Worklight Post processing software Multi head tool changer Appropriate full range of tooling Fully enclosed guarding All guardian and e-stops to meet min BS4163/2021 	1		
CNC Mill				
Supply and installation of CNC Milling Machine.	<ul style="list-style-type: none"> Integrated control system Digital Readout Minimum 750mm X 350mm X 550mm Travel (X/Y/Z) Multi speed control (RPM) Worklight auto change tool head Post processing software Appropriate full range of tooling All guarding and e stops to meet min BS4163/2021 	1		
Tooling				

Left hand cutting tool	Suitable for manual lathe supplied	7		
Right hand cutting tool	Suitable for manual lathe supplied	7		
Boring tool	Suitable for manual lathe supplied	7		
Knurling tool	Suitable for manual lathe supplied	5		
External parting tool	Suitable for manual lathe supplied	7		
External threading tool	Suitable for lathe supplied	5		
Internal threading tool	Suitable for lathe supplied	5		
Quick change tool holders	Suitable for tool posts supplied	35		
Die holder + mandrel	With morse taper sleeve to fit tail stock	5		
HSS slot mill cutter - multiple sizes	Suitable for manual mill supplied	2		
HSS end mill cutter - multiple sizes	Suitable for manual mill supplied	2		
Delivery / Installation costs				
Commissioning/ levelling	Include cost per machine			
Training	Minimum 2 Days Training required on operational controls for CNC machines plus additional days as relevant.			
Warranty Period	Minimum 12 Months Parts & Labour Warranty from date of commissioning.			
Annual Service fee	Annual Service Visit Manual Machines (Excludes Parts)	4		

5.2 The successful tenderer should provide details of discounts for prompt payment.

6 VAT

6.1 Please state clearly when submitting prices whether or not VAT will be charged.

6.2 Where the contract price agreed between the Academy and contractor is inclusive of any VAT, further amounts will not be paid by the Academy should a vatiable supply claim be made at any later stage.

- 6.3 Where the overall contract price is exclusive of VAT, the Academy will pay any VAT incurred at the prevailing rate (currently 20%). If the VAT rate changes the Academy will pay any VAT incurred at the new rate.
- 6.4 It is the responsibility of tenderers to check the VAT position with HMRC before submitting a bid.

7 Delivery / Installation requirement

Tenderer must state clearly when and how the product / service will be delivered by.

Products are to be delivered and installed at the following address:

WMG Academy for Young Engineers
251 Mitchell Ave,
Coventry
CV4 8DY

8 Equipment Country of Origin/ Delivery Time Scales and installation

The tenderer must be located in the UK and must submit / declare the equipment country of origin. This information plus delivery and installation time scales from the point of the tender being awarded should be recorded in the document provided (labelled "**Equipment country of origin delivery time scales and installation**") and indicate a timeline of the project noting any critical factors or risks to achieving this.

Below is an example of the table headings to be completed:

Equipment / Item	Country of origin	Estimated delivery time.	Estimated Installation time.	Critical Factors

9. Health and Safety considerations – training / servicing / requirements for installation.

The tenderer would need to include a method statement for installation of equipment and relevant risk assessment for installation of equipment in an educational setting in line with WMG Academy Trusts Health and Safety policy.

LIST OF ATTACHMENTS

- 1 STANDARD CONTRACT OF CONDITIONS FOR PURCHASE**
- 2 HEALTH AND SAFETY POLICY**

DECLARATIONS AND INFORMATION TO BE PROVIDED BY THE TENDERER

Declarations

- 1 (Name of tenderer) declares that we accept WMG Academy for Young Engineers standard terms and conditions included at Document 3 as the basis of the contract; and

- 2 declare that we have not communicated to any other party the amount or approximate amount of the tender price other than in confidence and for the express purpose of obtaining insurances or a bond in connection with this tender. The tender price has not been fixed nor adjusted in collusion with any third party, and

- 3 declare that the tender will remain valid and open for acceptance for a period of 60 days and that we are not entitled to claim from the Academy any costs or expenses incurred in preparing the tender or subsequent negotiations whether or not the tender is successful.

signed on behalf of the Tenderer

Undertaking

The Academy requires all tenderers to make full and frank disclosure to the Academy in the form of a signed undertaking in respect of any or all of the following:

- a) any state of bankruptcy, insolvency, compulsory winding up, administration, receivership composition with creditors or any analogous state of relevant proceedings;

- b) any convictions for a criminal offence committed by the tenderer (or being a company, by its officers or any representative of the company);

- c) any acts of grave misconduct committed by the tenderer (or being a company, by its officers or any representative of the company) in the course of their business or profession/the company's business;

- d) any failure by the tenderer (or being a company, by its officers or any representative of the company) to fulfil their obligations relating to payment of Social Security contributions; and

- e) any failure by the tenderer (or being a company, by its officers or any representative of the company) to fulfil their obligations relating to payment of taxes.

Schedule 1:

Schedule of Deliverables and Services for Contract TLCAP23.

Background

WMG Academy for Young engineers is a 14 - 19 school with a specialism in engineering and are currently running a T-level in Engineering Manufacture, Process and Control. As part of the delivery of the curriculum the students will undertake a range of practical and machining tasks in our workshop. WMG Academy Trust is looking to invest in creating a practical learning environment that is Industry standard and leading nationally in the delivery of vocational education for the next decade.

Aim of the Contract

The purpose of the contract is to renew and upgrade current equipment and technology in the Coventry site for WMG Academy for Young Engineers to bring the facilities inline with industry standard equipment and to future proof the facilities to enable the academy to deliver a world class T-level curriculum.

The Contractor shall use all reasonable endeavours to achieve this by delivery of the items noted below – The Services:

Item	Supply	Deliver	Install	Commission	Training	Annual Service for 4 year Term
Manual Lathe	Supply	Deliver	Install	Commission		Annual service for 4 year term
Manual Mill	Supply	Deliver	Install	Commission		Annual service for 4 year term
CNC Lathe	Supply	Deliver	Install	Commission	Training	Annual service for 4 year term
CNC Mill	Supply	Deliver	Install	Commission	Training	Annual service for 4 year term
Associated Tooling	Supply	Deliver	Install	Commission		

End of Schedule 1

Schedule 2

Eligible expenditure see example below

Task	Cost	Total	Invoice date
Manual Lathe as detailed in specification Supply, Deliver, Install and commissioning	TBC	TBC	Upon Completion of Commissioning
Manual Mill as detailed in specification Supply, Deliver, Install and commissioning	TBC	TBC	Upon Completion of Commissioning
CNC Lathe as detailed in specification Supply, Deliver, Install and commissioning	TBC	TBC	Upon Completion of Commissioning
CNC Mill as detailed in specification Supply, Deliver, Install and commissioning	TBC	TBC	Upon Completion of Commissioning
Associated Tooling as detailed in specification Supply, Deliver, Install and commissioning	TBC	TBC	Upon Completion of Commissioning
Training	TBC	TBC	Upon Completion
Annual Service Contract	TBC	TBC	30 days date of annual service
Grand Total (excluding VAT)			

- 1 The prices above are exclusive of VAT

- 2 The Contractor shall maintain full and accurate accounts for the Service against the expenditure headings in the Table. Such accounts shall be retained for at least 6 years after the end of the financial year in which the last payment was made under this Contract. Input and output VAT shall be included as separate items in such accounts.

- 3 The Contractor shall permit duly authorised staff or agents of the School or the National Audit Office to examine the accounts at any reasonable time and shall furnish oral or written explanations of the account if required. The School reserves the right to have such staff or agents carry out examinations into the economy, efficiency and effectiveness with which the Contractor has used the School's resources in the performance of this Contract.

- 4 One invoice shall be prepared by the Contractor on completion of the Service and shall be detailed against the expenditure headings set out in the Table. The Contractor or his or her nominated representative or accountant shall certify on the invoice that the amounts claimed were expended wholly and necessarily by the Contractor on the Service in accordance with the Contract and that the invoice does not include any costs being claimed from any other body or individual or from the School within the terms of another contract
- 5 The invoice shall be sent, within 30 days of the end of the Contract to [*insert name and address*], quoting the Contract reference number. The School undertakes to pay correctly submitted invoices within 30 days of receipt. The School shall not be responsible for any delay in payment caused by an incomplete or illegible invoice.
- 6 The Contractor shall have regard to the need for economy in all expenditure. Where any expenditure in an invoice, in the School's reasonable opinion, is excessive having due regard to the purpose for which it was incurred, the School shall only be liable to reimburse so much (if any) of the expenditure disallowed as, in the School's reasonable opinion after consultation with the Contractor, would reasonably have been required for that purpose.
- 7 If this Contract is terminated by the School due to the Contractors insolvency or default at any time before completion of the Service, the School shall only be liable under paragraph 1 to reimburse eligible payments made by, or due to, the Contractor before the date of termination.
- 8 The School shall not be obliged to pay the invoice until the Contractor has carried out all the elements of the Service specified as in Schedule 1.
- 9 It shall be the responsibility of the Contractor to ensure that the invoice covers all outstanding expenditure for which reimbursement may be claimed. On payment of the invoice by the School all amounts due to be reimbursed under this Contract shall be deemed to have been paid and the School shall have no further liability to make reimbursement of any kind.
- 10 It shall be the responsibility of the Contractor to ensure that the final invoice covers all outstanding expenditure for which reimbursement may be claimed. Provided that all previous invoices have been duly paid, on due payment of the final invoice by the School all amounts due to be reimbursed under this Contract shall be deemed to have been paid and the School shall have no further liability to make reimbursement of any kind.

End of Schedule 2

Scoring system for Tender Evaluation

Annex 1

Evaluation scoring matrix

0-5 scoring system:

Assessment	Score	Summary	Interpretation
Excellent	5	Very strong evidence of appropriate knowledge, skills or experience.	As well as addressing all, or the vast majority of, bullet points under each criteria heading, it will demonstrate a deep understanding of the project. All solutions offered are linked directly to project requirements and show how they will be delivered and the impact that they will have on other areas/stakeholders.
Good	4	Sufficient evidence provided of appropriate knowledge, skills or experience. Have confidence in their ability to deliver the required service	Will reflect that tenderers will have addressed, in some detail, all or the majority of the bullet points listed under each criteria heading. Evidence will have been provided to show not only what will be provided but will give some detail of how this will be achieved. tenderers should make clear how their proposals relate directly to the aims of the project and be specific, rather than general, in the way proposed solutions will deliver the desired outcomes
Acceptable	3	Reasonable evidence of appropriate knowledge, skills or experience. Meets requirements in many areas but not all.	Will again address the majority of the bullet points under each criteria heading but will lack some clarity or detail in how the proposed solutions will be achieved. Evidence provided, while giving generic or general statements, is not specifically directed toward the aims/objectives of this project. Any significant omission of key information as identified under each criteria heading will point towards a score of 3.
Minor Reservation	2	Some evidence of appropriate knowledge, skills or experience. Meets requirements in some areas but with important omissions	Will reflect that the tenderer has not provided evidence to suggest how they will address a number of bullet points under the evaluation criteria heading. Tenders will in parts be sketchy with little or no detail given of how they will meet project requirements. Evidence provided is considered weak or inappropriate and is unclear on how this relates to desired outcomes.

Serious Reservations	1	Very little evidence of appropriate knowledge skills or experience	Will reflect that there are major weaknesses or gaps in the information provided. The tenderer displays poor understanding and there are major doubts about fitness for purpose.
Unacceptable	0	No evidence/response	Will result if no response is given and/or if the response is not acceptable and/or does not cover the required criteria.

WMG Academy for Young Engineers - scoring and weighting grid

Your capability to perform the contract will be evaluated using the criteria set out below and the scoring matrix above. The highest scoring bid will be considered the most economically advantageous tender and the successful tenderer (subject to the standstill period).

Scoring Grid

Section Number	Assessment Criteria	Weighting	Assessment Score (0-5)	Total score
2	Requirement			
	<p>Tenderers should ideally possess relevant experience and technical knowledge to deliver the tender and meet the specification. You should provide evidence outlining the suitability of your company, demonstrated by on-going and historical information relevant to the specification within the tender.</p> <p>However, WMG Academy trust recognises that this may not be possible for all tenderers new to the field, or for small providers whose customer base is limited, in which case the information given should relate as closely as possible to this ideal. Tenderers who are unable to demonstrate this will fail.</p>	5		
3	Project Delivery / Installation and Commissioning			
	<p>Tenderers should describe their approach to the requirement stated in the specification. They should include:</p> <ul style="list-style-type: none"> • Evidence of lead time to delivery and installation. • Evidence of quality assurance undertaken for the products delivered. • Explain how the company operates a suitable approach to Contract dispute resolution and how they manage and respond to complaints • Explain the steps will you take to keep WMG Academy Trust informed if an order cannot be delivered on time and in full. • Explain the contingency measures you will have in place to support WMG Academy Trust in the event that a product is 	10		

	unavailable for a prolonged period of time.			
4	Meets Educational Needs			
	Tenderers should describe how their products are appropriate to educational settings and can meet the needs of the students in the context of WMG academy for young engineers. (no more than 500 words).	5		
5	Insurance			
	<p>For insurance cover, the requirement is as follows:</p> <p>£5m Employers' liability insurance (any one occurrence)</p> <p>£5m Public liability insurance (any one occurrence)</p> <p>£5m Product liability insurance (any one occurrence and in the aggregate)</p> <p>Any tenderer who does not show WMG Academy trust that they hold the required levels of insurance specified above or agree to increase to these levels will fail to be considered.</p> <p>Please note that you will be required to provide copies of insurance certificates as part of the tender bid, at no extra cost to WMG Academy Trust and award cannot be made unless provided.</p> <p>Please note that employers' liability insurance is only required for those organisations who employ staff.</p> <p><i>(please attach to the tender submission any suitable documentation to support your evidence for example scanned insurance certification)</i></p>	5		
6	Health and safety including safeguarding			
	<p>The tenderer must include a method statement for installation of equipment and relevant risk assessment for installation of equipment in an educational setting.</p> <p>Any Tenderer that fails to provide satisfactory evidence to manage health and safety effectively and control</p>	15		

	significant risks relevant to the requirement (including risks from the use of Third party contractors, where relevant) will fail to be considered.			
7	Value for money			
	<p>Tenderers should explain how they will demonstrate “value for money” by addressing the following questions:</p> <ul style="list-style-type: none"> • How will you manage and mitigate the impact of market cost factors within the supply chain? • How will you support WMG Academy Trust with servicing and maintenance costs for the lifetime of the equipment? 	10		
8	Costs			
	<p>All tenderers are required to detail their prices in the excel spreadsheet provided</p> <p>All tenderers must take care to ensure they provide a price for each product/service/element of the pricing schedule as specified. All prices should be given excluding VAT.</p> <p>Failure to complete the pricing schedule in full may result in the Tender being rejected.</p> <p>The price score for each tenderer will be calculated based upon the overall lowest price submitted of all bids received. The Tenderer with the lowest overall price will be awarded the full score of 250, with the remaining Tenderers gaining pro-rated scores in relation to how much higher their prices are when compared with the lowest price.</p>	50		

Award Stage- Weighting of Scores for each Requirement Section (using example above)

Requirement Heading	Maximum Weighted Score
Requirement	25
Project Delivery {and Pilot Testing}	50
Education	25
Insurance	25
Health and Safety	75
Value for money	50
Costs	250
Maximum Total	500