

## CISL ERDF Sustainability Hub and Accelerator - Innovate to Adapt Summative Assessment

### ANNEX A - STANDARD DETAILS AND SELECTION CRITERIA QUESTIONNAIRE

Please complete the questionnaire below which will not be scored but the answer 'no' to some selection questions may result in rejection. If the question does not apply, please write **N/A**; if you don't know the answer please write **N/K**.

Completing and returning this documentation does not in any way guarantee any work.

<b>Section 1 BASIC DETAILS OF YOUR ORGANISATION</b>		
1.1	Name of the organisation:	
1.2	Contact name:	
1.3	Job Title:	
1.4	Name of Consultant if different from above:	
1.5	Company address and post code:	
1.6	Telephone number:	
1.7	E-Mail address:	
1.8	Social Media references:	
1.9	Website address:	
1.10	Company Registration number (if applicable):	
1.11	Charities or Housing Association or other Registration number (if applicable):	
1.12	Date of Incorporation or Registration:	
1.13	Registered address if different from the above	
1.14	VAT Registration number:	
1.15	Is your organisation:	i) A public limited company?
		ii) A limited company?
		iii) a partnership
		iv) a sole trader
		v) other (please specify)
1.16	Name of (ultimate) parent company (if this applies):	
1.17	Companies House Registration number of parent company (if applicable):	
1.18	How many staff does your organisation employ? (If you are a sole trader, please say so)	

<b>Section 2 FINANCIAL INFORMATION (Selection)</b>		
2.1	Please provide details of your turnover and net profit for the last two financial years:	
2.2	Can you provide copies of your audited annual accounts for the last two years:	

2.3	Has your organisation met the terms of its banking facilities/loan agreements (if any):	
2.4	If 'No' what were the reasons, and what has been done to put things right?	
2.5	Has your organisation met all its obligations to pay its creditors and staff during the past year?	
2.6	If 'No' please explain why not:	

<b>Section 3 REFERENCES (Selection)</b>			
Please provide details of two recent contracts that are relevant to this tender			
		Reference 1	Reference 2
3.1	Name of customer:		
3.2	Contact name and phone number:		
3.3	Contract dates:		
3.4	Contract value:		
3.5	Brief details about the service you provided:		
3.6	Brief details about targets achieved:		
3.7	Have you had any contracts terminated for poor performance in the last three years, or any contracts where damages have been claimed by the contractor?		
3.8	If 'Yes', please give details:		

<b>Section 4 INSURANCE (Selection)</b>		
Please provide details of your current insurance cover:		Value
4.1	Employer's Liability:	
4.2	Public Liability:	
4.3	Professional Indemnity:	
4.4	Other (please provide details):	

<b>Section 5 POLICIES (Selection)</b>		
5.1	Does your organisation have a written health and safety at work policy?	
5.2	Does your organisation have a sustainability policy?	
5.3	Does your organisation have an equality and diversity policy and is this compliant with current legislation?	

<b>Section 6 PROFESSIONAL AND BUSINESS STANDING (Selection)</b>		
Do any of the following apply to you/your organisation, or to any director(s)/partners/proprietor(s)?		
6.1	Is in a state of bankruptcy, insolvency, compulsory winding up, receivership, composition with creditors, or subject to relevant proceedings	

6.2	Has been convicted of a criminal offence related to business or professional conduct	
6.3	Has committed an act of grave misconduct, in the course, of business	
6.4	Has not fulfilled obligations related to payment of social security contributions	
6.5	Has not fulfilled obligations related to payment of taxes	
6.6	Is guilty of serious misrepresentation in supplying information	
6.7	Is not in possession of relevant licences or membership of an appropriate organisation where required by law	
6.8	If the answer to any of these is 'Yes' please give brief details below, including what has been done to put things right:	

<b>Section 7 DECLARATIONS OF INTEREST (Selection)</b>	
7.1	Please identify if any of your staff personnel has been employed by the University and/or related to any member of staff employed by the University? If so, please provide further details?

<b>Section 8 Annex A - SIGNED DECLARATION</b>	
I declare that to the best of my knowledge the answers submitted in this document (and any supporting information) are correct. I understand that the information will be used in the evaluation process to assess my suitability to provide the services described.	
<i>Electronic signatures or typed names are acceptable. In the event that your organisation is successful you will be required to resign this form with an original signature.</i>	
<b>FORM COMPLETED BY:</b>	
8.1	Name:
8.2	Position:
8.3	Date:
8.4	Tel number:
8.5	Signature:

## Annex B – Tender Response Form

### **Award Criteria Section 1:**

Please set out your experience and capability to deliver the required Summative Assessment including previous experience of working with ERDF or other relevant funding streams. Your response should include details of team members and information on their relevant qualifications and experience to deliver this work.

**Award Criteria Section 2:**

Please set out, in detail, your proposed methodology for delivering the required Summative Assessment with reference to the objectives and methodology set out in Section 3 and 4 of the specification including your approach to impact assessment. Your response should reference compliance with DLUHC requirements for Summative Assessment reports and how you will work with the CISL team.

**Award Criteria Section 3:**

Please provide a detailed timetable for delivery of the Summative Assessment to include a plan of activities, key stages and dates, production of an initial draft and production of a final Summative Assessment report (required in April 2023).

.

**Award Criteria Section 4:**

Please set out your anticipated costs for delivery including estimated consultancy time, day rates for named staff plus other staff time and any other costs envisaged.

--

**Annex B - SIGNED DECLARATION**

I declare that to the best of my knowledge the answers submitted in this document (and any supporting information) are correct. I understand that the information will be used in the evaluation process to assess my suitability to provide the services described.

*Electronic signatures or typed names are acceptable. In the event that your organisation is successful you may be required to re-sign this form with an original signature.*

**FORM COMPLETED BY:**

8.1	Name:	
8.2	Position:	
8.3	Date:	
8.4	Tel number:	
8.5	Signature:	