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## 1. Aim

Beetroot Consulting (BC) is committed to ensuring that activity is conducted in accordance with the highest standards of integrity, probity and openness. The aim of this policy is, in relation to purchasing activity, to ensure that BC can demonstrate and evidence that all contracts entered into by BC have been done so in a way that is fair to potential suppliers, avoids the opportunity for private gain, complies with all relevant regulations and represents value for money.

## 2. Scope

This policy covers procurement activity for Beetroot Consulting as a legal entity.

The policy is applicable to all individuals acting on behalf of BC including those who are employed, contractors, volunteers, directors and local governors. The policy sets out the rules by which BC spends its resources on goods, contracts and services.

## 3. Roles & Responsibilities (Financial Authority to Commit Expenditure)

Any process which involves committing BC to expenditure must be approved in accordance with the appropriate schemes of delegation. The BC Scheme of Delegation confirms who has the authority and to what financial level.

The Director is responsible for approving the Scheme of Delegation.

All staff are responsible for working within the Procurement Policy.

## 4 Principles

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Effective procurement will assist BC in achieving its mission of ‘making a world where Tech-for-good is a reality for organisations and their end users’. Engaging with third parties carries risk and it is therefore imperative that procurement is managed within a clearly defined framework to enable us to:

- **Upholding BC’s Values** – Procurement decisions need to reflect BC’s core values
- **Meet business needs** – At the outset we will have approved budgets, clear specifications and documented requirements to ensure suppliers meet or exceed the business’ needs.
- **Optimise spend to get the best value** - We will place business with the best value suppliers and purchase in a consistent manner across BC to optimise our buying power. Achieving the best value for money does not always mean choosing the cheapest price.
- **Comply with all relevant legislative and regulatory requirements** – We will ensure that financial penalties, threats to our licences or disruptions to operations are avoided.
- **Protect reputation** – We will comprehensively assess existing and new suppliers to protect against ethical and legal risks that could lead to significant financial and reputational damage for BC.
- **Manage the risk of fraud, bribery and corruption across our supplier portfolio** -
- **Due Diligence** – Suppliers financial situations may be fragile so appropriate diligence is required and significant payments in advance should be avoided wherever possible.
- **Environmental Responsibility** –All purchasing decisions should give due regard to their environmental impact.
- **Community Responsibility** – BC should seek, to benefit through purchasing, the local community where possible by utilising local firms which contribute to the local economy.

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## 4. Purchase Ordering

As far as possible, all expenditure, should be incurred using an official purchase order. However, there may be times when the need for an order is not appropriate, for example:

- **Trivial items** of a small value through petty cash (e.g. postage stamps);
- **Personal expenses** incurred on company business (e.g. mileage claims for car journeys);
- **Statutory or Mandatory** items (e.g. rates bills, payments to HMRC);
- **Payroll related expenditure;**
- **Company credit card purchases;**
- **Emergency work.**

Purchase orders are authorised by Directors, in line with the authorisation limits as laid down in the BC Delegated Levels of Authority.

No member of staff is authorised to commit BC to expenditure without first ensuring that there is adequate budget provision. Schemes of work should not be artificially broken down into smaller orders to phase the issue of purchase orders and thereby circumvent either authorisation levels or the requirement to obtain further quotes/tenders.

Any member BC representative placing a purchase order must be sure that they have the correct level of authority to do so in accordance with the scheme of delegation and, where required, must obtain approval from a more senior member of staff with a higher approval limit if necessary.

All staff who may raise purchase orders should satisfy themselves that where required, contractors have appropriate DBS/CRB clearance before raising an order for work.

Each supplier will have a unique number to each order and suppliers are asked to quote this number on their invoices to enable invoices to be matched efficiently to properly authorised purchase orders and facilitate prompt payment.

On receipt of the goods/services, the person responsible for requesting the goods/services (or their nominee) checks the quality and quantity of what has been

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delivered against the order. Where there is any problem with the quality of the goods or the goods received are different to what was ordered, the Director should be notified immediately and the supplier will be contacted without delay.

When an invoice has been checked and agreed to the order. The invoice is processed for payment and both the purchase ledger and the cash book are updated accordingly.

Where there is a discrepancy, then the invoice is held, awaiting an explanation of the differences. Once the difference is identified, the budget holder authorises the changes, in order for the invoice to be paid.

Valid and undisputed invoices are paid within 15-30 days. Where there is a dispute, the budget holder, or Director, contacts the supplier as soon as possible and, in any event, within 30 days of receiving the invoice.

## 6 Quotations and Tenders

It is good practice to invite competitive quotations for all items of expenditure to ensure value for money. Managers at all times will be expected to justify their purchasing decisions.

BC require the following to be complied with in relation to purchasing:

- Items expected to cost below £5,000 – It is good practice to obtain three written quotes.
- Items expected to cost between £5,001 and £50,000 – Three written quotes must be obtained and retained for audit evidence and available for inspection by BC external auditors at any time. (Quotes should be forwarded to Director for retention purposes)
- Items expected to cost between £50,001 and £189,229– All contracts must go through a competitive tendering process (subject to rare exceptions)
- Items expected to cost in excess of £189,330 – Competitive tenders must be obtained in accordance with WTO's GPA rules. (NB Threshold for works contracts is £4,733,452)

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## 7 Tendering Procedure

The tender process aims to invite all potential suppliers to bid for the provision of goods/services. The appropriate channels for advertising the tender should be agreed with Director (e.g. through the general press, trade journals etc. and/or through direct contact with potential suppliers). Where the estimated contract value is above the WTO Threshold, the opportunity must be advertised in accordance with WTO rules.

As a guide to preparing a Tender, the BC Tender Procurement Toolkit should be used (Appendix 1). The invitation to tender should remain open for a minimum of 30 days and state the date and time by which the completed tender document should be received by BC.

When preparing a tender, full consideration must be given to;

- How the goods or services to be procured might improve the economic, social and environmental well-being of the relevant area;
- The object and overall requirements of the contract;
- The technical skills and after-sales service required;
- The scoring criteria and weightings that reflect their relative importance;
- The form of contract.

All invitations to tender must include the following:

- Introduction or background to the project;
- Scope and objectives of the project;
- Technical requirements;
- Factors relating to the implementation of the project;
- Terms and conditions of the tender;
- Scoring criteria and weightings; and
- The form of response required including the relevant deadline.

**Tender Evaluation and Decision** – Decisions should be made with reference to the criteria for evaluation published as part of the invitation to tender.

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**NB. All awards of contracts over the value of £50k or which have significant impact on business operation must be assessed by the FD or Deputy FD for financial health.**

Following the decision, all parties should be informed of the outcome. A 'stand still' period of at least 10 days should be applied during which further communication with the successful bidder is prohibited.

The unsuccessful bidders are provided with an issue notice comprising the following information:

- criteria for the award;
- the reason for the decision (including the characteristics and relative advantages of the successful tender);
- the date that the 'stand still' period ends.

**Award of Contract** - Prior to the delivery of goods, or commencement of the service, the successful tenderer must sign a formal contract. For contracts above the OJEU Threshold, BC should publish a contract award notice to the OJEU.

## 8 Dispensations from Tender Requirements

In limited circumstances a dispensation from the requirement for Tendering may be granted and may allow BC to solicit a single quotation or award a contract without having obtained the requisite number of tenders or directly award a contract.

All dispensations require approval from the BC Director and must not result in a breach of procurement legislation or be contrary to the Scheme of Delegation. All dispensation requests, will be reported to the BC Director for their approval.

Dispensations from the requirement for tenders must not be used to avoid competition, or for administrative convenience, or to award fresh / further work to a supplier originally appointed through a competitive procedure. All dispensations will be subject to obtaining appropriate evidence and must never breach relevant OJEU thresholds.

Subject to approval, dispensations may be granted for the following reasons:

- Unforeseen emergency requirement

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- The goods or services are only available from one source and there is no possibility of BC's requirements being met in any other way
- An extension is required to a current contract in order to allow sufficient time to complete a competitive tendering exercise (but failure to have planned the re-procurement would not be justification for a single tender)
- Where the seeking of tenders and subsequent contract award could cause significant operational difficulties and where any potential savings accruing from the tender are seen as outweighed by those operational issues and/or the costs of conducting a tender exercise
- Where no suitable suppliers have come forward through the tender process it may be acceptable to negotiate a contract with a suitable alternative supplier.

## 9 Frameworks

BC may from time to time establish framework arrangements of preferred suppliers in order to purchase services and/or goods on an ongoing or ad hoc basis. BC may utilise existing external public sector frameworks.

## 10 Related Party Transactions

Related party transactions must be monitored and scrutinised by budget holders and a Director, prior to approval being made. An internal register of interests will be maintained for staff and board members with authority to approve purchases.

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## Appendix 1 Tender Procurement Toolkit

### Purpose of the Document

The purpose of this document is to provide guidance, techniques and tools for those involved in procuring through a tender exercise.

The need to procure through open tender applies to contracts whose value exceeds £50,000 ex VAT. There are exceptions to the tender requirements.

#### How to use this document

The main body of the document contains guidance about the different phases of procuring via tender including some example standard documents and checklists, with notes and things to think about at various key stages. The main body of the document will help you understand the key issues and the procedure itself.

When you are familiar with the procedure, a generic tender document is attached which can be adapted to suit the requirements each particular procurement exercise Appendix One becomes relevant.

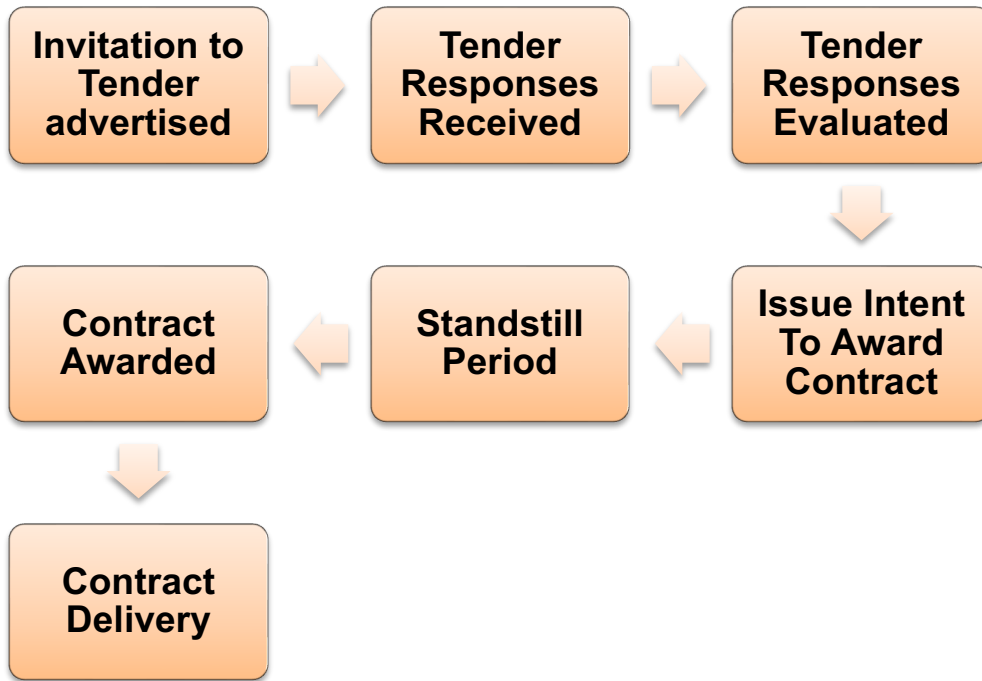
### Tendering Overview

The most common form of tender procurement that Beetroot Consulting will use process is a single stage one where the tender document aims to assess the suitability and ability of suppliers to deliver the contract.

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An overview of the various stages in the tendering process is shown below:



## Invitation to Tender (ITT)

The Tender exercise aims to assess and evaluate a supplier’s suitability and ability to deliver the advertised goods/services – to achieve this an ITT is likely to have has main sections:

- Diligence Information
- Invitation to Tender
- Supplier Declaration
- Financial Template

### Diligence Information

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In eliciting diligence information Beetroot Consulting wants to know and be assured that the potential supplier has the overall capacity, experience and skill base to deliver the contract.

The diligence stage will require information about the financial position of the company and looks for evidence of effective financial management and corporate governance.

Diligence questions will be split into a number of sections, and typically covers:

- **General Company details** - including address, contact details and company structure. In considering which company within the group is best placed to be named as Lead Provider – consideration should be given to:
  - experience and track record
  - the company's turnover in comparison to the size of the contract
  - the company's balance sheet
  - geography and existing relationships
- 5. **Financial and Governance Information** - including audited accounts, turnover and profit information and confirmation of insurance covers. **NB. Finance Director or Deputy FD must sign off financial due diligence on contracts over the value of £50k, or contracts which are central to the operation of the business.**
- 6. **Policies and Procedures** - information is requested about Equal Opportunities, HR, Health and Safety and Environmental Information.
- 7. **Technical Information and References** – we may ask for examples that demonstrate experience of providing the various aspects of the services required and for two or three references to help to assess technical experience and ability.

## Invitation to Tender

The Invitation to Tender usually contains the following sections/documents.

- **Introduction** - background information on the tender
- **Tender Conditions** - the legal parameters surrounding the tender
- **Specification** - the description of the services to be provided
- **Instructions for Tender Submission** - instructions for the bidders e.g. timetable, submission deadlines etc.
- **Qualitative Tender Response** – specific questions about how the services will be provided,

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- **Pricing/Costs** - quantitative questions to be answered by the bidder
- **Form of Tender** - declaration to be signed by the bidder

The ITT is concerned with how the service will be delivered and will use specific questions/method statements to ascertain how the potential supplier aims to deliver the service, the specific responsibilities and how they will implement the service.

### **Supplier Declaration**

A Supplier Declaration should be part of the document in which the supplier evidences their tender responses and acknowledges that any errors or omissions may lead to their bid being disqualified.

### **Financial Template**

Suppliers should be provided with a financial template to complete which will provide the price of their bid and financial details therein. The templates can be adapted for each individual tender exercise but must be the same within the tender document to allow Beetroot Consulting to compare bids.

### **Assessing Tender Bids**

Tenders should be assessed in accordance with the scoring criteria outlined in the Invitation to Tender.

## **The Outcome of the Tender Process**

Once bids have been scored and decision made there are number of things that must be done.

### **Standstill Period**

The intention of Beetroot Consulting to award the contract and apply a standstill period should be communicated to all bidders. The standstill period should be a minimum of 10 days to allow any appeals or objections to be made from unsuccessful bidders.

Once the standstill period has ended and there are no outstanding objections then the following communication can be issued.

### **An unsuccessful bid**

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For unsuccessful bidders we should inform them of the result and offer the opportunity for feedback on the bid.

Details of the feedback should be recorded and filed on the Shared Drive and the Tender Tracking Form updated to say that feedback has been received.

### **A successful bid**

The successful bidder should be notified that the standstill period has ended and be congratulated of their success, Detailed negotiations can then take place that will include:

- review of contract by legal adviser
- negotiation with the procurer – to finalise contract values and contract terms
- ensuring appropriate insurance cover in place
- developing a mobilisation plan
- developing a communications plan

### **Beetroot Consulting's' approach/principles of working with sub-contractors**

It's important that there is clarity from the outset in our relationships with suppliers, so the following principles/expectations have been developed. These set out what a supplier can expect from us and what we expect from a supplier. These can be used in initial discussions with successful suppliers and can be incorporated in agreements and working protocols.

Beetroot Consulting is a value led social enterprise group. It's not just about what we do, it is how we do it. All of our businesses share the same values:

- We lead with authenticity
- We embrace difference
- We create clarity
- We deliver quality

Beetroot Consulting Suppliers can expect us to:

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- **Be honest, fair and transparent** – in all our dealings with you from discussions about the basis of the contract price through to performance management
- **Communicate effectively and meet regularly** – to discuss progress on contract delivery, any issues and challenges and to collaboratively develop solutions
- **Support and challenge** – work with suppliers to help them meet contract requirements and deliver the best possible service. We share our expertise and enable knowledge transfer
- **Clearly set out requirements and responsibilities** – with contract documentation which sets out deliverables, financial terms, risk sharing approach, roles and responsibilities and agreed reporting processes in place
- **Respond flexibility** to changes in procurers' requirements or with suppliers
- **Pay when we say we will** – allowing subcontractors to plan and manage the financial aspects of the contract

We expect Beetroot Consulting suppliers to:

- **Have similar values and ethos to us** because it's not just what we do but how we do it that makes a difference.
- **Offer and deliver a quality service** providing people with the opportunity
- **Work with us to offer a competitive, best value contract price** to help ensure that we secure the contract.
- **Effectively resource the contract** – identifying and sticking with key contact points for the contract. Like us we expect you to have the right people with the right level of seniority involved in managing the contract.
- **Be responsible and accountable contract performance** – we can and will offer help and support, but suppliers need to work with us for this to be effective
- **Talk to us and be open, honest and transparent** – strong relationships and effective partnerships are built on good communications. We want to know when things are going well but also when suppliers have problems or issues so that we can share our expertise to help resolve problems quickly.
- **Provide the monitoring information and supporting evidence** required by us to support contract management – we will only ask for what is needed.
- **Meet contract requirements** having the right policies, procedures and systems in place.
- **Respond flexibility** if required to any changes our requirements
- **Meet agreed timescales/deadlines** – both during the bid process and during contract delivery – if we make commitments, we should stick with them responding when we say we will.

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- **Share best practice and learning** with everyone involved helping us all to improve what we do and how we do it
- **Commit to maximising community engagement through** local employment, volunteering opportunities and service user involvement

## **Contracts**

All supply arrangements entered into by Beetroot Consulting must be reflected in formal signed contract documentation.

Copies of all signed contracts must be filed on the shared filing system.

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## Appendix 2 Example of a Generic Tender

### 1. Background

Beetroot consulting is...

#### Who we are and values

At Beetroot Consulting:

- We lead with authenticity
- We embrace difference
- We create clarity
- We deliver quality

### 2. Requirements

#### a) Selection process

We are undertaking a single stage process to select an organisation to provide XXXC. The bidder is requested to provide a response to the attached Questionnaire below which aims demonstrates that they:

- Possess the organisational capability to deliver **XXX**
- Deliver the relevant and appropriate service, including the key works noted in Section 2.b) below.
- Provide value for money through a competitive price for the provision of **XXX**.

#### b) Key works dependant on the season (not an exhaustive list)

- XXX
- XXX
- XXX

### 3. Contract details

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The contract duration will be for a **period of 3 years** with annual reviews.

The **maximum annual fee for the contract will be £xxx ex VAT.**

#### 4. Other requirements

##### Disclosure Barring Service checks

Some of the locations are schools/nurseries/children’s centres and may will require the supplier to ensure all staff have up-to-date enhanced DBS checks. Also any visits to site to carry out works must always be pre-arranged with a senior member of staff.

#### 5. Responses & Timetable

Please complete the Questionnaire below by XXX and email it to XXX, putting in the subject header of your email Tender for XXX Service and your full company name. A read receipt will be provided in the form of a response email, but in addition please request one through your email client/program.

If you would like to arrange a further conversation about the Tender Specification, please contact **XXX**.

**Bidders may be required to attend an interview**, the date and time to be confirmed.

The anticipated Timetable for this procurement exercise is detailed below but this may be subject to change.

Event	Date
Tender Issued	
Completed Questionnaires Required	
Evaluation	
Notification of Decision	
Standstill Period ends	
Contract Award	
Contract Commences	

##### Scoring of ITT Questions

	Maximum Marks

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<b>Cost</b>	<b>50</b>
<b>Responses</b>	<b>40</b>
<b>Additionality</b>	<b>10</b>
<b>Diligence</b>	<b>Pass or Fail</b>

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## 1. Company Information

Full name of your organisation:	
Registered Office Address	
Company/ Charity Registration Number and date of registration	
VAT Registration Number	
Parent Company details (if applicable)	
Type of organisation	

## 2. Contact Details

Name	
Address (if different from above)	
Telephone	
Mobile	
E-mail	
Website (if any)	

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### 3. Economic and Financial Standing (if you cannot provide this please explain why at the end of this section)

Please provide copies of your audited accounts for the last three financial years

To be attached

Does your organisation have a credit rating with a recognised organisation (e.g. DUNS)? If so, please supply your certificate number.

Yes/No

Please confirm contact details to supply a bankers reference below:

Name of Bank

Address of Bank

Contact name

Contact Telephone Number

Does your organisation have any outstanding claims, litigation or judgements against or other court orders which could affect the financial stability of the organisation? If Yes, please provide details below:

Yes/No

### 4. Probity

Is your organisation or your directors or partner organisations the subject of proceedings for a declaration of bankruptcy, compulsory winding up order, or administration by the court or for an arrangement with creditors?

Yes/No

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Have the directors ever been convicted of an offence concerning their professional conduct?	Yes/No
Has your organisation ever not fulfilled its obligations relating to the payment of social security contributions in accordance with the legal requirements?	Yes/No
Has your organisation ever not fulfilled its obligations relating to the payment of taxes in accordance with legal requirements?	Yes/No
Has your organisation ever been asked to pay financial penalties in respect of a failure to perform to the terms of a contract?	Yes/No
Has your organisation ever had a contract terminated under the terms of a contract?	Yes/No
Has your organisation ever failed to receive a contract renewal on the basis of unsatisfactory performance?	Yes/No
If you have answered yes to any of the questions please provide details	

**5. Insurance – please complete the table below indicating current insurance provisions for your company and provide copies of each policy with your completed PQQ**

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<b><u>Insurance</u></b>	<b>Insurance Company</b>	<b>Policy Number</b>	<b>Date Cover Ends</b>	<b>Amount of Cover</b>
<b>Employers Liability</b>				
<b>Public Liability</b>				
<b>Professional Indemnity</b>				

## 6. Quality

Is your organisation a member of a professional body or bodies that ensure a quality service? If yes, please supply details/copies of certificates.	Yes/No
Does your organisation have an accredited Quality Management System? If yes – please provide a copy of the certificate.	Yes/No

## 7. Relevant Experience

Please describe your previous experience of supplying refurbishment works, detailing where you have met any specified standards and timescales as well as drawing up costings of works. Any particular experience with regard to social/supported housing is welcome. (500 words)

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## 8. Employment

Please provide details of written policies or procedures which prove that, as an employer, you follow equal opportunities legislation and that it is your policy and practice not to treat any person less favourably because of their race (including colour, nationality or ethnic or national origins), age, gender, sexuality, disability or religion/belief when you are recruiting, training or promoting employees.

Are staff that have managerial responsibilities required to receive training on equality and diversity?	Yes/No
Is it your policy as an employer to comply with your statutory obligations under the Equality Act 2010?	Yes/No
In the last three years, has any finding of unlawful racial discrimination in the employment field been made against your organisation by the employment tribunal, the employment appeal tribunal, or any court, or in comparable proceedings in any other jurisdiction?	Yes/No (if yes please provide details)
In the last three years, has your organisation been the subject of formal investigation by the Equality and Human Rights Commission (EHRC) on the grounds of alleged unlawful discrimination in the employment field?	Yes/No (if yes please provide details)

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<p>In the last three years, has any finding of unlawful sex or disability discrimination in the employment field been made against your organisation by the employment tribunal, the employment appeal tribunal, or any court, or in comparable proceedings in any other jurisdiction?</p>	<p>Yes/No (if yes please provide details)</p>
<p>Does your organisation ensure fair employment, both as a direct employer and in the organisations in your supply chain? Please describe how:</p>	
<p> </p>	
<p>Comply with national minimum wage requirements and working time directives?</p>	<p>Yes/No</p>
<p>Encouraging training, employee relations, employee development, trade union recognition, consultation with the workforce, and dispute resolution?</p>	<p>Yes/No</p>

**9. Health and Safety**

<p>Does your organisation have a written Health and Safety at Work policy which includes a Statement, Organisation, and Arrangements sections? Please provide a copy.</p>	<p>Yes/No</p>
<p>Does your organisation have a Health and Safety quality standard or kite mark (e.g. CHAS)? If so, please supply a copy of certificate.</p>	<p>Yes/No</p>
<p>Do you have a Health and Safety Manager and are arrangements in place to put this policy into practice?</p>	<p>Yes/No</p>

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During the last three years, has your organisation been prosecuted for contravening the Health and Safety at Work Act 1974 or other health and safety legislation, or has your organisation been (or is currently) the subject of a formal investigation by the Health and Safety Executive?	Yes/No (if yes please provide details of steps taken)
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## 10. Environment

Does your organisation have an Environmental and Sustainability Policy?	Yes/No
Does your organisation have an accredited Environmental kite mark?	Yes/No
Within the last three years has your organisation been prosecuted by or issued with an improvement notice or an enforcement notice or an order by the Environmental Agency or other enforcement body responsible for protecting the environment?	Yes/No (if yes please provide details of steps taken)

## 11. Data Protection

Does your organisation have a data protection policy (in line with DPA Act 2018)?	Yes/No
Do you store personal information about Clients in an electronic form i.e. on a computer?	Yes/No
Are you legally able to hold and process this data under the principles of the DPA 2018?	Yes/No

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## 12. Disclosure Barring Service

Do you agree that any staff carrying out work on this contract will have a current DBS check, and will you continue to monitor this throughout the life of the contract?

Yes/No  
(if no please explain further)

## 13. References

Please give details of two organisations to which you currently supply similar services that would provide us with a reference, together with the approximate annual value of the contract or business transacted.

Details	Organisation One	Organisation Two
Name:		
Address:		
Project Title:		
Contact:		
Tel No:		
Email:		
Annual Value:		

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Description of Service Provided		
Award Date of Contract		
Length of Contract		

## Beetroot Consulting - Invitation to Tender

1. In line with the Requirements set out within the Tender Specification, please describe how your team will work with the client to supply the goods/services required? (500 words)

2. Beetroot Consulting is passionate about involving communities and people in their services – how can you provide additional value by making sure that there is meaningful involvement in the works? (500 words)

3. Please tell us how you will minimise environmental impact and use sustainable resources. (250 words)

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4. Describe how you will ensure you provide a timely service. (250 words)

5. Please detail below how you will incorporate risk assessments and method statements to ensure you deliver a quality and safe service. (250 words)

6. Provide an organisational structure diagram which identifies:

- key relationships with regional management/directors
- on and off site management arrangements

**In addition, bidders should provide up to 3 curriculum vitae (CV) for key contract staff.**

7. Bidders must confirm staff availability for this contract.

8. Please describe below your proposed schedule/timetable for implementation in order to achieve the contract date detailed in the specification.

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9. Please detail your fee for the supply of the work and ensure you have completed the attached financial template.

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## Beetroot Consulting Group - Supplier Declaration

### Declaration

I declare to the best of my knowledge that the answers submitted in this document are correct. I understand that the information will be used in the process to assess by organisation's suitability and understand that you may reject this response if there is a failure to answer all relevant questions fully or if I provide false/misleading information.

<b>Name:</b>	
<b>Position</b>	
<b>Date</b>	
<b>Signature</b>	

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