

THE BIG LiFE GROUP



Procurement Policy

Procurement Policy

| | |
|------------------------|-----------------------|
| Policy Name | Procurement |
| Document Reference | BLG255 |
| Version Number | 1 |
| Ratified By | Executive Team |
| Board approval needed? | Yes – Audit Committee |
| Board Ratified Date | |
| Review Period | Annual |
| Review Date | Nov 26 |

Contents

1. Aim
 2. Scope
 3. Roles and Responsibilities
 4. Principles
 5. Purchase Ordering
 6. Quotations and Tendering
 7. Tender Procedures
 8. Dispensations from Tender Requirements
 9. Frameworks
 10. Related Party Transactions
 11. Associated Policies
- Appendix 1. Tender Procurement Toolkit
- Appendix 2. Example of a Generic Tender

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

1. Aim

The Big Life Group 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 Big Life can demonstrate and evidence that all contracts entered into by the group 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 all companies within the Big Life Group and includes the legal entities noted below:

| Name | Company Number | Charity Number |
|-----------------------|----------------|----------------|
| Big Life Company | 04227431 | Not Applicable |
| Big Life Services | 03311884 | 1062333 |
| Big Issue North Trust | 03164559 | 1056041 |

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

3. Roles and Responsibilities

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

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

Big Life Group Scheme of Financial Delegation is linked to Big Life's eReqs purchase order system, which will not allow orders to be raised without appropriate approval.

The Board of Directors and Trustees are responsible for approving the Scheme of Financial Delegation. The Finance, Risk and Audit Committee are responsible for approving the Procurement Policy on behalf of the boards.

All staff are responsible for working within the Procurement Policy.

4. Principles

Effective procurement will assist Big Life in achieving its strategic goal of doing good business. 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 Big Life's values:** Procurement decisions need to reflect Big Life's values: inspiration, creativity, valuing difference, honesty, thoughtfulness and courage.
- **Meet business needs:** At the outset, we will have approved budgets, clear specifications and documented requirements to ensure suppliers meet or exceed the group's needs.
- **Optimise spend to get the best value:** We will place business with the best value suppliers and purchase in a consistent manner across the group 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 Big Life.
- **Manage the risk of fraud, bribery and corruption across our supplier portfolio:** We will act in accordance with our Fraud Policy (BLG0077).

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

- **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:** Big Life is proud to have achieved Environmental Standard ISO14001. All purchasing decisions should give due regard to their environmental impact.
- **Community Responsibility:** As a community-centred organisation, Big Life should seek to benefit the local community through purchasing where possible, by using local firms that contribute to the local economy.
- **Information Security:** Big Life is committed to managing risks to information security and ensuring the confidentiality, integrity, and availability of its data. As such, it will set out the information security expectations for all suppliers and ensure suppliers are committed to them.
- **Modern Slavery:** Big Life will ensure that modern slavery does not form part of our supply chain by carrying out due diligence on suppliers before working with them.

5. Purchase Ordering

As far as possible, all expenditure, should be incurred using an official purchase order through Big Life's eReqs system. However, there may be times when the need for an order is not appropriate, such as:

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

Purchase orders are authorised by an appropriate member of staff, in line with the authorisation limits in the Delegated Levels of Authority (appendix 4 of the Finance Handbook (BLG289)).

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

No member of staff is authorised to commit Big Life 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 or tenders.

Purchase Orders, contracts and payments should only be raised or made to suppliers that have been set up on the eReqs system.

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

The eReqs system will assign 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. The matching process is also a key financial control over Big Life's expenditure. Failure to comply will result in invoices being returned to the supplier unprocessed and unpaid, resulting in a potential disruption to future services from that supplier.

On receipt of the goods or services, the person responsible for requesting them (or their nominee) checks the quality and quantity of what has been delivered against the order and acknowledges their receipt on the eReqs system. Where there is any problem with the quality of the goods or the goods received are different to what was ordered, the Finance Office should be notified immediately, and the supplier will be contacted without delay.

When an invoice has been checked and agreed to the order and the goods or services have been receipted on eReqs, the invoice is processed for payment by the Finance Office staff and both the purchase ledger, and the cash book are updated accordingly.

Where there is a discrepancy, 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 30 days. Where there is a dispute, the budget holder, or Finance Office staff, contacts the supplier as soon as possible and, in any event, within 30 days of receiving the invoice.

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

6. Quotations and Tenders

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

The Big Life Group requires 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 Big Life's external auditors at any time. All tender documentation should be forwarded to Finance for retention purpose.
- Items expected to cost between £50,001 and £181,301– All contracts must go through a competitive tendering process (subject to rare exceptions) and the Finance Director should be informed of all tenders that are taking place.
- Items expected to cost in excess of £400,000– Competitive tenders must be obtained in accordance with the World Trade Organisation (WTO) Agreement on Government Procurement (GPA) rules (NB. The threshold for construction services is £5,000,000). The thresholds are due to be revised in January 2026, so please check for revised thresholds after that date: <https://e-gpa.wto.org/en/Thresholds>.

6. Tendering Procedure

The tender process aims to invite all potential suppliers to bid for the provision of goods or services. The appropriate channels for advertising the tender should be agreed with the Finance Director (for instance, through the general press, trade journals 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.

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

As a guide to preparing a tender, the 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 Big Life.

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

- Whether a non-disclosure agreement (NDA) is required. An NDA could be required in advance of sharing a tender if the ITT includes confidential information or if an open tender presented a risk to The Big Life group.
- 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
- Information Security requirements (as set out on the IT Applications product and service selection form (BLG348))
- Factors relating to the implementation of the project
- Terms and conditions of the tender

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

- Scoring criteria and weightings
- 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.

All awards of contracts over the value of £50k, or which have significant impact on business operation must be assessed by the Finance Director 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 WTO Threshold, Big Life should publish a contract award notice to the WTO.

8 Dispensations from Tender Requirements

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

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

All dispensations require approval from the Finance Director or CEO, and must not result in a breach of procurement legislation or be contrary to the Scheme of Delegation. All requests will be reported to the Executive Team for approval and recorded in the procurement folder.

Dispensations from the requirement for tenders must not be used to avoid competition, or for administrative convenience, or to award fresh or 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 WTO thresholds.

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

- Unforeseen emergency requirement
- The goods or services are only available from one source and there is no possibility of Big Life'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 being outweighed by those operational issues 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

Big Life may, from time to time, establish framework arrangements of preferred suppliers to purchase services or goods on an ongoing or ad hoc basis. Big Life may use existing external public sector frameworks.

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

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.

11 Associated Policies

This policy should be read in conjunction with the following associated policies:

- BLG077: Financial Conduct Policy
- BLG078: Contractors Policy
- BLG179: NED Conflict of Interest Policy
- BLG289: Finance Handbook

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

Purpose of the Document

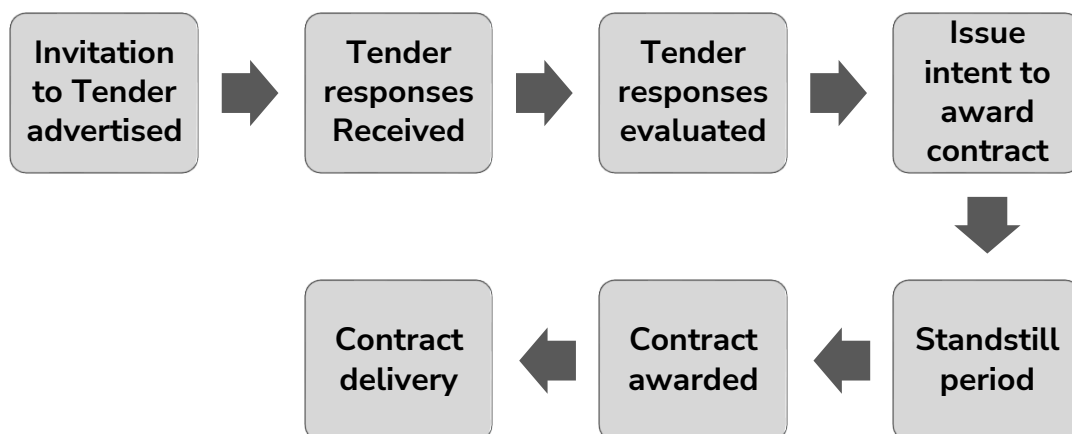
The purpose of this document is to provide guidance, techniques and tools for staff involved in procuring through a tender exercise. The need to procure through open tender applies to contracts whose value exceeds £50,000 (excluding VAT). There are exceptions to the tender requirements and full details are contained in The Big Life Group's Procurement Policy.

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 (Appendix two) is attached which can be adapted to suit the requirements each particular procurement exercise.

Tendering Overview

The most common form of tender procurement that Big Life 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. An overview of the various stages in the tendering process is shown below:



Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Classification: Private

To be reviewed: Nov 26

Version Number: 1

Revised: Nov 25

Invitation to Tender (ITT): The tender exercise aims to assess and evaluate a supplier's suitability and ability to deliver the advertised goods or services. To achieve this, an ITT is likely to have these main sections:

- **Diligence Information:** In eliciting diligence information, Big Life wants to know and be assured that potential suppliers have 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
 - **Financial and Governance Information:** Including audited accounts, turnover and profit information and confirmation of insurance covers. The Finance Director must sign off financial due diligence on contracts over the value of £50k, or contracts which are central to the operation of the business.
 - **Policies and Procedures:** Information is requested about equal opportunities, HR, information security, health and safety, modern slavery and environmental information.
 - **Information Security:** For tenders of IT services, software or applications the IT Applications product and service selection form must be completed by providers.
 - **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.

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

- **Invitation to Tender:** The Invitation to Tender is concerned with how the service will be delivered and will use specific questions and method statements to ascertain how the potential supplier aims to deliver the service, the specific responsibilities and how they will implement the service. It usually contains the following sections and 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 such as a timetable, submission deadlines and so on
 - **Qualitative Tender Response:** Specific questions about how the services will be provided
 - **Pricing or Costs:** Quantitative questions to be answered by the bidder
 - **Form of Tender:** Declaration to be signed by the bidder
- **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 Big Life to compare 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 Big Life to award the contract and apply a standstill period should be communicated to all bidders.

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

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:** 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
 - final agreed contract signed in accordance with the Financial Handbook
 - ensuring appropriate insurance cover in place
 - developing a mobilisation plan
 - developing a communications plan

Storing procurement information

All procurement documents (ITT, due diligence and so on) received from suppliers during a procurement process should be sent to the Finance Team, who will save them in the Procurement folder on Teams.

Big Life's approach and 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 and 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.

The Big Life Group 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:

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

- **Courage:** We stand up for ourselves, and the people and communities we work alongside, even when that makes us unpopular, or challenges accepted wisdom
- **Creativity:** We find innovative solutions that work, never accepting the easy option or the status quo.
- **Honesty:** We act with integrity, speaking the truth to ourselves and others
- **Inspiring:** We are inspired by the people and communities we work with and share what we learn from them to inspire others
- **Thoughtfulness:** We act with care and compassion and work to understand people's experiences. We take time to listen, reflect and continually learn
- **Valuing Difference:** We recognise and celebrate the unique qualities, gifts, insights and perspectives that different people offer

Suppliers can expect us to:

- 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 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 flexibly 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.

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

We expect Big Life 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 to change their lives.
- 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 and 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.

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

- 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
- Prioritise information security, keep data safe and work aligned to best practice

Contracts

All supply arrangements entered into by The Big Life Group must be reflected in formal signed contract documentation. Contracts should be issued by the appropriate legal entity (The Big Life Company, Big Life Services, or Big Issue in the North Trust) – not The Big Life Group.

Copies of all signed contracts must be sent to the Finance Team, who will file them in the Contracts channel on Teams.

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

Appendix 2 Example of a Generic Tender

Background

The Big Life Group is a social enterprise with a mission is to fight for equity – in health, in wealth and in life. Our vision is that by 2030, we will be the go-to organisation for reducing inequity, working with communities and providing support in the north of England. We focus in areas and services where we can have the biggest impact on reducing inequity, where we can innovate and where we are a good fit locally. We prioritise communities that experience the highest health, social and economic inequities. Find out more at www.thebiglifegroup.com.

The organisation is continually improving standards of health and safety to comply with legislation and considers safety a main priority for its employees and clients; this includes ensuring our grounds are maintained, safe and inviting to all who work at or visit our businesses. It also ensures we operate to a high standard that meets our statutory obligations while maintaining attractive environments where people want to work and engage with our services.

We are a values-led organisation and adopt the values listed below. Everything we do will be driven by the need to help people change their lives, however small or large those changes might be. Big Life works differently, constantly challenging ourselves and others.

Our values and philosophy

The Big Life Group prides itself on demonstrating:

- Courage
- Creativity
- Honesty
- Inspiration
- Thoughtfulness
- Valuing Difference

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

Requirements

Selection process

We are undertaking a single stage process to select an organisation to provide XXX. The bidder is requested to provide a response to the attached questionnaire below, which 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.

Contract details

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

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

Other requirements

Disclosure Barring Service checks: Some Big Life locations include schools, nurseries and children's centres, and may require the supplier to ensure all staff have up-to-date enhanced DBS checks.

Responses and timetable

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

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

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 |
|---------------|---------------|
| Cost | |
| Responses | |
| Additionality | |
| Diligence | Pass or fail |

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

The Big Life Group: Due Diligence Questionnaire

1. Company information

| | |
|---|--|
| Full name of your organisation | |
| Registered office address | |
| Company or 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 | |
| Email | |
| Website | |

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

3. Economic and financial standing

If you cannot provide this information, please explain why at the end of this section.

| | | |
|---|--|----------------|
| Please provide copies of your audited accounts for the last three financial years | | Attached (Y/N) |
| Does your organisation have a credit rating with a recognised organisation (e.g. DUNS)? If so, please supply your certificate number. | | Y/N |
| Please confirm contact details to supply a banker's 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 so, please provide details below. | | Y/N |
| | | |

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? | Y/N |
| Have the directors ever been convicted of an offence concerning their professional conduct? | Y/N |
| Has your organisation ever not fulfilled its obligations relating to the payment of social security contributions in accordance with the legal requirements? | Y/N |

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

| | |
|--|-----|
| Has your organisation ever not fulfilled its obligations relating to the payment of taxes in accordance with legal requirements? | Y/N |
| Has your organisation ever been asked to pay financial penalties in respect of a failure to perform to the terms of a contract? | Y/N |
| Has your organisation ever had a contract terminated under the terms of a contract? | Y/N |
| Has your organisation ever failed to receive a contract renewal on the basis of unsatisfactory performance? | Y/N |
| If you have answered yes to any of the questions, please provide details below | |
| | |

5. Insurance

Please complete the table below indicating current insurance provisions for your company and provide copies of each policy.

| | Insurance company | Policy number | Date cover ends | Amount of cover |
|------------------------|-------------------|---------------|-----------------|-----------------|
| Employers Liability | | | | |
| Public Liability | | | | |
| Professional Indemnity | | | | |

6. Quality

| | |
|---|-----|
| Is your organisation a member of a professional body or bodies that ensure a quality service? If so, please supply details or copies of certificates. | Y/N |
| Does your organisation have an accredited Quality Management System such as ISO? If so, please provide a copy of the certificate. | Y/N |

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

7. Relevant experience

Please describe previous relevant experience, referring to the web specification. (500 words)

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

8. Employment

| | |
|--|-----|
| Please provide details of written policies or procedures that 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, religion or belief when recruiting, training or promoting employees. | |
| | |
| Are staff that have managerial responsibilities required to receive training on equality and diversity? | Y/N |
| Is it your policy as an employer to comply with your statutory obligations under the Equality Act 2010? | Y/N |
| 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? If so, please provide details | Y/N |
| 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? If so, please provide details | Y/N |
| 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? If so, please provide details | Y/N |
| Does your organisation ensure fair employment, both as a direct employer and in the organisations in your supply chain? Please describe how | |
| | |
| Does your organisation comply with national minimum wage requirements and working time directives? | Y/N |
| Does your organisation encourage training, employee relations, employee development, trade union recognition, consultation with the workforce, and dispute resolution? | Y/N |

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

9. Health and safety

| | |
|--|-----|
| Does your organisation have a written Health and Safety at Work policy which includes a Statement, Organisation, and Arrangements sections? Please provide a copy. | Y/N |
| Does your organisation have a Health and Safety quality standard or kite mark (e.g. CHAS)? If so, please supply a copy of certificate. | Y/N |
| Do you have a Health and Safety Manager and are arrangements in place to put this policy into practice? | Y/N |
| 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? If so, please provide details | Y/N |
| 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? If so, please provide details of steps taken. | Y/N |

10. Environment

| | |
|--|-----|
| Does your organisation have an Environmental and Sustainability Policy? | Y/N |
| Does your organisation have an accredited Environmental kite mark? | Y/N |
| 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? If so, please provide details of steps taken. | Y/N |

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

11. Data protection

| | |
|--|-----|
| Does your organisation have a named Data Protection Officer | Y/N |
| Does your organisation have a data protection policy (in line with DPA Act 2018)? Please include a copy. | Y/N |
| Has the organisation had any data breaches within the last two years that were notifiable to the ICO? If yes what enforcement action, if any, was taken by the ICO and what measures have been put in place to ensure the breach wouldn't be repeated? | Y/N |
| Do you store personal information about clients in an electronic form? | Y/N |
| Are you legally able to hold and process this data under the principles of the DPA 2018? | Y/N |
| Please confirm the lawful basis under which you hold and process PII | |

12. Modern slavery

| | |
|--|-----|
| Does your organisation have a Modern Slavery Statement? If so, please provide it. | Y/N |
| Does your organisation monitor areas at risk of modern slavery, and identify measures that can be put in place to remove and reduce risks? | Y/N |
| Does your organisation monitor your own supply chain with regards to modern slavery, and would any breaches of the Modern Slavery Act 2015 be reported? The Group will mandatorily exclude working with any organisation or an individual that has been convicted of an offence under the Act. If so, please provide details of steps taken. | Y/N |
| Please note: Supplier contracts include a clause that where the group is of the opinion that either the working practices significantly contravene its expectations set out in this statement, or there has been insufficient progress being made by the contractor or supplier to address non-compliance, then it may terminate any business relationship immediately. | |

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

12. Modern slavery

| | |
|---|-----|
| 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? If not, please explain further | Y/N |
|---|-----|

14. References

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

| | Organisation One | Organisation Two |
|---------------------------------|------------------|------------------|
| Name | | |
| Address | | |
| Project Title | | |
| Contact | | |
| Tel No | | |
| Email | | |
| Annual Value | | |
| Description of service provided | | |
| Award Date of contract | | |
| Length of contract | | |

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

Invitation to Tender Questionnaire

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 or services required (500 words).

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

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

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

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).

- 5. Provide an organisational structure diagram which identifies:**
- key relationships with regional management and directors
 - on- and off-site management arrangements

In addition, bidders should provide up to three CVs for key contract staff.

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

7. Bidders must confirm staff availability for this contract.

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

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

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26

The Big Life Group: Supplier 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 or misleading information.

| | |
|-----------|--|
| Name | |
| Position | |
| Date | |
| Signature | |

Before using this document, you should ensure that you have the most up-to-date version. If you are referring to a printed version it may be out of date. If in any doubt, please check with HR.

Document Reference: BLG255

Version Number: 1

Classification: Private

Revised: Nov 25

To be reviewed: Nov 26