



**Invitation to Quote
for the provision of solar PV
under a PPA agreement at
Heron Hall Academy**

Heron Hall Academy

46 Queensway, Ponders End, Enfield EN3 4SA

1. Contents and timetable

This invitation to quote relates to the design and installation of a solar PV array at Heron Hall Academy and the provision of a PPA for the solar power.

Contract Period: 25 years

Start Date: January 2023

Overview: This invitation to quote relates to the installation of solar photovoltaic (Solar PV) panels at Heron Hall Academy. The installs should be carried out with the relevant grid and planning consents and look to maximise generation for the school through a PPA (Power purchase agreement) that is competitive and provides financial gains in the short, medium and long term along with associated social value and governance for the school. Given the procurement market for equipment for solar installations, the system should be commissioned in the next six months.

North Star Community Trust would like to thank you for your interest in this opportunity. This document contains the questions that you will need to complete and return, in addition to all supporting information about the School's requirements and the evaluation process.

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2. Specification

1.	Introduction
	<p>The Trust is looking to achieve financial control of its electricity cost, through a fully funded installation and maintenance contract with a PPA for the solar power used on site generated by the solar PV panels located on the site's roofs. As well as gain financially, the aim of the project is for the Trust to:</p> <ol style="list-style-type: none"> 1. Reduce its dependence on electricity suppliers, to control energy costs in both the short and long term 2. Cut its carbon emissions 3. Enhance education for sustainable development in line with the Department for Education's pedagogy strategy
22.	Scope
	<p>The required installation must look at how to achieve the Trust's objectives by maximising generation for a PPA rate to deliver financial returns, with mechanisms in place so the PPA rate can be adjusted by the Trust's management team over the medium to long term, to give future management teams flexibility for change.</p> <p>Contractors will be required to provide (as part of the contract):</p> <ol style="list-style-type: none"> 1. A PPA rate for the proposed installation: details as specified below. 2. Survey the building structure and obtain all the necessary consents, including but not limited to planning and grid, that are required for the installation. 3. Provide all CDM documentation for the install 4. Design, supply and install the solar PV system including all components necessary to achieve a fully functional system 5. Ensure installation meets with existing roof warranties, DC and AC electrical requirements and takes into account asbestos and other potential hazards. 6. Be responsible for any access equipment required to complete the works. 7. Commission and quality check the Solar Photovoltaic system installed by MCS-accredited installers. 8. Manage the school's connection agreement and liaise with the grid Distribution Network Operator (DNO) to ensure compliance with latest standards of installation. 9. Ensure that the installation meets with the required planning approvals and any other legislative consent. 10. Ensure at least one yearly site installation/performance assurance visit as part of the supplier's maintenance programme with access to financial performance of the system so profits from the system can be distributed to the school. 11. Link the solar PV install to a monitoring platform that can be accessed online by the school staff and students. 12. Enhance the learning opportunities by linking campus and curriculum with workshops, online and digital activities. Help site teams understand their data. <p>Contract Period to installation: 8 months</p> <p>Start Date: January 2023</p>

	End Date: 31 st August 2023
33.	PPA proposal
	<p>The Trust is aware that different companies may have significant variances in business models for a PPA but the Trust is looking to achieve not only short-term gains but also given the legacy nature of the project (to deliver zero-carbon electricity today and tomorrow), to secure medium and long-term advantages too for the Trust. As a centre of teaching and learning it is key to the project that learning can be delivered to the school and wider community.</p> <p>We need a full understanding of how the contract will work and how much influence the Trust could have on the contract over time. Please provide details on the governance of the organisation offering the PPA.</p> <p>Our goal is to progress towards carbon neutrality for 2030 with suppliers that can support the school and the Trust's ambitions.</p>
4.	Objectives
	<p>The objectives are to:</p> <ol style="list-style-type: none"> 1. Install solar PV at zero capital cost and gain zero-carbon solar power which the Trust will pay for 2. Monitor and maintain it at no cost to the Trust, delivering zero-carbon electricity over the medium to long term. 3. Provide cost savings to the schools now and a mechanism for the Trust to be able to alter the price they pay for the solar power in the future 4. Deliver education for sustainable development linked to electricity use
5.	Description of service to be provided – The requirements
	<p>To provide a PPA for the installation and maintenance of a 140kWp system (350 x 400W panels) on the roof of Heron Hall Academy as per the design outlined in Appendix 1.</p> <p>The building is listed and the PPA must cover all the development costs associated with the install including but not exclusive to, planning, grid and structural surveys.</p> <p>Whilst the choice of installation equipment will be down to the PPA provider, it should be of a quality to ensure that the system remains operational and any downtime due to technical failures are kept to a minimum to ensure that the Trust receives the solar power at all times.</p> <p>Please provide details of the investors who will fund the PPA, details on the mechanism that will be used to increase the PPA and your Heads of Terms so they can be reviewed along with evidence that your terms meet Department for Education sign off.</p> <p><u>Background:</u></p> <p>The school has an existing 93kWp system and uses 450,000 kWh of electricity a year. It has no capital to invest in the system.</p>

	<p><u>Safety</u></p> <p>From the outset the PPA provider should consider the potential hazards carefully, and systematically devise methods to minimise the risks. This shall include both mitigating potential hazards present during and after the installation phase to ensure long-term safety of those visiting the school.</p> <p>The long-term safety of the system can be achieved only by ensuring that the system and components are correctly designed and specified from the outset, followed by correct installation, operation and maintenance of the system. Consideration of operation under both normal and fault conditions is essential in the design stage to ensure the required level of safety needed for the system to be located on the roofs of the Trust's school.</p>
6.	Constraints
	<p>Installation teams will be required to be DBS approved (at the supplier's cost). Terms will have to be agreeable to the Secretary of State of the Department for Education and evidence that your terms are acceptable needs to be provided.</p> <p>The building is listed and full planning permission will be required before any installation can take place.</p> <p>Installation should be completed before 31st August 2023</p>
7.	Performance measures and project success
	<p>Project commencement – January 2023</p> <p>Consents: legal, planning and grid by April 2023</p> <p>Final designs, procurement agreement by May 2023</p> <p>Installs and commissioning – by August 2023</p>
8	Contract management communication requirements
	<ul style="list-style-type: none"> • Key named contact • Monthly email updates / video conference updates • Respond to requests within 3 working days • Adhere to project time plan • Ensure system is linked to online monitoring platform that can be accessed by students and staff. • Contracts/heads of terms that clearly show how the PPA can be managed over time to the benefit of the school/Trust.
9.	Mobilisation
	<p>The supplier will mobilise as soon as possible and carry out surveys, and to gain the necessary details to apply for consents and to allow a structural survey. Subject to approval of surveys and consents, arrangements will be made with the school for installation to take place. The Trust will help liaise to manage the initial survey work.</p>

10.	Value for Money assessments														
	<p>All suppliers will be scored according to financial, social and environmental factors against their abilities to:</p> <ul style="list-style-type: none"> • Provide a competitive PPA that provides savings to the school/Trust • Any additional financial benefits that might be available to the school • Deliver a lower carbon footprint over the whole contract period • Enhance the social benefits that the school has to its community <p>Namely:</p> <ul style="list-style-type: none"> • Price: the PPA value that includes design, development, installation and monitoring • Evidence of a robust maintenance programme to ensure solar power provision continues for the whole of the contract • Financial benefits: savings and additional financial benefits, where available • Carbon savings for the school and the mechanism in place to continue to deliver savings • Social benefits that may include: an educational pathway to enhance education for sustainable development and/or funding with social benefits • Terms that allow the school and the Trust to be able to influence the PPA over the long term and the maintenance of the system on their roofs. 														
11.	Evaluation of supplier quotes														
	<p>Following receipt of the supplier quotes, your ability to deliver the contract will be evaluated using the selection and award criteria below.</p> <table border="1"> <thead> <tr> <th>Criteria</th><th>Weighting</th></tr> </thead> <tbody> <tr> <td>1.CONTRACT & SERVICES- Ability to deliver contract over time</td><td>20%</td></tr> <tr> <td>2.SOCIAL VALUE Social gains</td><td>20%</td></tr> <tr> <td>3.LONG TERM MANAGEMENT - Mechanism to increase or decrease PPA</td><td>10%</td></tr> <tr> <td>4.LONG TERM MANAGEMENT- Governance; contract terms</td><td>10%</td></tr> <tr> <td>5.FINANCIAL BENEFITS -Provision of financial benefits</td><td>5%</td></tr> <tr> <td>6.COST-PPA COST</td><td>35%</td></tr> </tbody> </table> <p>The Trust will evaluate the quotes received against the criteria listed to establish a ranking, in terms of the offer that brings the most value to the Trust over the contract period. Suppliers may be required to answer queries during the evaluation period to provide clarification regarding their quote.</p>	Criteria	Weighting	1.CONTRACT & SERVICES- Ability to deliver contract over time	20%	2.SOCIAL VALUE Social gains	20%	3.LONG TERM MANAGEMENT - Mechanism to increase or decrease PPA	10%	4.LONG TERM MANAGEMENT- Governance; contract terms	10%	5.FINANCIAL BENEFITS -Provision of financial benefits	5%	6.COST-PPA COST	35%
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The process will allow the Trust to primarily select the supplier that can deliver the best value for money in both the short term and over the term of the contract. The Trust shall not be bound to accept the lowest priced PPA offer.

Quotes submitted without all the information required for the evaluation criteria will be considered incomplete and may therefore be rejected.

The following is the scoring matrix that will be used for bids in the awards stage:

Responses will be evaluated in line with the following scoring systems. The scores generated for each question will be combined to provide an overall score which will determine which organisations will be shortlisted.

There will be different marks awarded to different categories of questions. The table below shows the marks allocation.

Scoring

The following examples illustrate how cost and quality and social value quality elements in the 'scored criteria' table will be scored.

Cost element

Cost will be scored as a comparison of your quote to that of the lowest compliant quote received as follows:

% scored = (lowest bid / your bid) * Cost weighting

Quality element – Questions asked within the questionnaire will be scored out of 10 using the marking system below.

The score will be calculated to reflect the percentage weighting applied to that question (as shown below) and will contribute to the overall quality and social value quality weightings:

% score for each question = your score / maximum score available x question weighting

The scores for each question will be added together to provide a total score. The total scores will be used to select the supplier who can deliver across all areas of the contract and is deemed to best meet the objectives of the Trust.

The Trust will allocate scores based on the following model:-

Requirements evaluation criteria

Assessment	Score	Summary
Excellent	10	Very strong evidence of appropriate knowledge, skills or experience.
Good	8	Sufficient evidence of appropriate knowledge, skills or experience. Have confidence in their ability to deliver the required service

	Acceptable	6	Reasonable evidence of appropriate knowledge, skills or experience. Meets requirements in many areas but not all.												
	Minor reservations	4	Some evidence of appropriate knowledge, skills or experience. Meets requirements in some areas with obvious omissions												
	Serious reservations	2	Very little evidence of appropriate knowledge, skills or experience.												
	Unacceptable	0	No evidence or response												
12.	Timescales														
	<p>The intended timetable for this invitation to quote is in the table below. We need to review the market but equally are looking for an installation as soon as practicable.</p> <table><tr><th>Stage</th><th>Date</th></tr><tr><td>Invitation to Tender issued</td><td>06/01/23</td></tr><tr><td>Deadline for clarification questions to the School via Susan Ellingham sellingham@northstartrust.org.uk</td><td>13/01/23 at 12 noon</td></tr><tr><td>Deadline for tender to be submitted via the email address sellingham@northstartrust.org.uk</td><td>20/01/23 at 12 noon</td></tr><tr><td>Planned notification of the result to suppliers who have submitted a tender</td><td>25/01/23</td></tr><tr><td>Contract start date</td><td>31/01/23</td></tr></table>			Stage	Date	Invitation to Tender issued	06/01/23	Deadline for clarification questions to the School via Susan Ellingham sellingham@northstartrust.org.uk	13/01/23 at 12 noon	Deadline for tender to be submitted via the email address sellingham@northstartrust.org.uk	20/01/23 at 12 noon	Planned notification of the result to suppliers who have submitted a tender	25/01/23	Contract start date	31/01/23
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3. Supplier's response section for Quote

Instructions

In order to demonstrate how the supplier will provide the service that fully meets the requirements as detailed in the specification, the Trust requires the supplier to provide a response to the quality and price questions within this section.

The supplier must assume that The Trust will have no prior knowledge of the organisation and must provide all information they wish to be considered as part of the evaluation of quotes supplied. This may include quantitative evidence to support responses to the questions asked.

Please read and comply with the following points:

1. It is important that you answer **all** the questions as fully as possible unless indicated otherwise.
2. **Do not** change the format of the response documents as they will be used for the official scoring.
3. Save this document and complete your response within this document, in the boxes provided.
4. **Do not** send any general marketing material or promotional information for your organisation by way of answers to any of the questions.
5. **Do not** insert or embed documents or website links within this response.
6. **Do not** attach additional documents in response except where otherwise directed.
7. If you are part of a corporate group, please answer the questions specifically for your organisation (not the group).
8. **Failure** to fully complete this questionnaire and comply with the instructions may result in disqualification of your submission.
9. The name of the organisation submitting the quote for services must be clearly marked on all pages of any documentation provided if supplied as attachments.
10. All questions **must** be answered in full.
11. All documents **must** be written in English.

Thank you.

Please answer the table below in full.

Question	Response
Pass and Fail Questions	
Potential supplier information only	
Full name of the potential supplier submitting the information	
Contact name and contact position (job title) for enquiries about this submission	
Registered office address	
Registered website address	
Trading status 1. public limited company 2. limited company 3. limited liability partnership 4. other partnership 5. sole trader 6. third sector 7. other (please specify your trading status)	
Company registration number (if applicable)	
Charity registration number (if applicable)	
Registered VAT number	
Trading name(s) that will be used if successful in this procurement	
Are you a Small, Medium or Micro Enterprise (SME)? See definition of SME https://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en	Yes/ No [Please delete as appropriate]
Details of immediate parent company (if applicable): 1. Full name of the immediate parent company 2. Registered office address 3. Registration number (Please enter N/A if not applicable)	
Financial: Pass/ Fail	
Please confirm that the company quoting to provide the PPA has sufficient financial standing to be able to deliver the services required.	Yes/ No [Please delete as appropriate]

<p>The Trust also reserves the right to undertake financial evaluations, re-evaluations, credit checks or assessments as necessary to determine an organisation's financial condition at any time.</p>	
<p align="center">Insurance: Pass/Fail</p>	
<p>Please confirm that your current insurance cover meets the levels required. We reserve the right to seek evidence or ask that sufficient levels of insurance be in place before award of contract. All quotes should be based on full insurance levels being in place (or willing to obtain prior to contract commencement should you be successful).</p>	<p>Yes/ No</p> <p>[Please delete as appropriate]</p>
<p>Employer's liability: (£5m)</p>	<p>Yes / No</p>
<p>Public / Products liability: (£10m)</p>	<p>Yes / No</p>
<p>Professional indemnity: (£2m)</p>	<p>Yes / No</p>
<p><i>If you are unable to answer 'yes', please provide an explanation as to how the company ensures that it is correctly covered in insurance terms.</i></p>	
<p align="center">Professional and business standing information: Pass/Fail</p>	
<p>Does any of the following apply to your organisation, or to (any of) the director(s) / partners / proprietor (s)?</p>	
<p>Is in a state of bankruptcy, insolvency, compulsory winding up, receivership or subject to relevant proceedings:</p>	<p>Yes/ No</p> <p>[Please delete as appropriate]</p>
<p>Has been convicted of a criminal offence related to business or professional conduct</p>	<p>Yes/ No</p>
<p>Has committed an act of gross misconduct in the course of business</p>	<p>Yes/ No</p>
<p>Has not fulfilled obligations related to payment of social security contributions</p>	<p>Yes/ No</p>
<p>Has not fulfilled obligations related to payment of taxes</p>	<p>Yes/ No</p>

Is guilty of serious misrepresentation in supplying information	Yes/ No
Is not in possession of relevant licences or membership of an appropriate body where required by law	Yes/ No
<i>If the answer to any of these is 'yes' please give brief details below, including what has been done to put things right: (500 words)</i>	
Policy compliance: Pass/Fail	
Modern slavery Does your company have a written modern slavery statement or policy that demonstrates compliance with the Modern Slavery Act 2015? <i>If you are unable to answer 'yes' to this question and your turnover is above £36m and a policy is therefore required, you must be able to demonstrate how your organisation complies with the Modern Slavery Act 2015. If you are unable to answer 'yes' and your turnover is above £36m, please include your response here:</i> <i>If you are unable to answer 'yes' please include your response here:</i>	Yes/ No/ Not required [Please delete as appropriate]
Health and safety Does your organisation have a health and safety policy that complies with current legislative requirements?	Yes/ No [Please delete as appropriate]
Scored Questions	
Please note any word count limits Do not attach documents unless specifically informed that you may. Where attachments are permitted please use standard formats easily available such as: Microsoft Office, PDF etc. You must type your answer in the table below. The answer boxes expand if required. The current size of the answer box does not reflect the size of the answer. All questions will be marked in accordance with the methodology described.	

Contract and services: delivery questions: Scored – Weighting 20%	
Question	Weighting
<p>1. a) Project delivery: plan and timeline</p> <p>Please give details of your proposed plan for</p> <ol style="list-style-type: none"> 1. the install including timescales and milestones 2. delivery of the monitoring and maintenance 3. delivery of financial benefits 4. delivery of educational gains <p>If required, you may add the plan as a further attachment (not included in the word count) however your description of your plan should be included in the text below (and will be included in the page count)</p>	20%
<p>Answer: Please add your response here: 500 words max: Font Arial 11</p> <p>Appendix for diagrams or other supporting images.</p>	

b) Experience: as part of this question

Please provide two examples of how you have successfully delivered similar services to a school/Trust.

Please outline how you successfully delivered the service requirements and how you addressed any issues and risks in order to deliver services on time and within budget.

Please provide details of the staff/ other resources that will deliver the contract and what each person within the team's role will be. Please also explain any contingency plans for staff - supply issues.

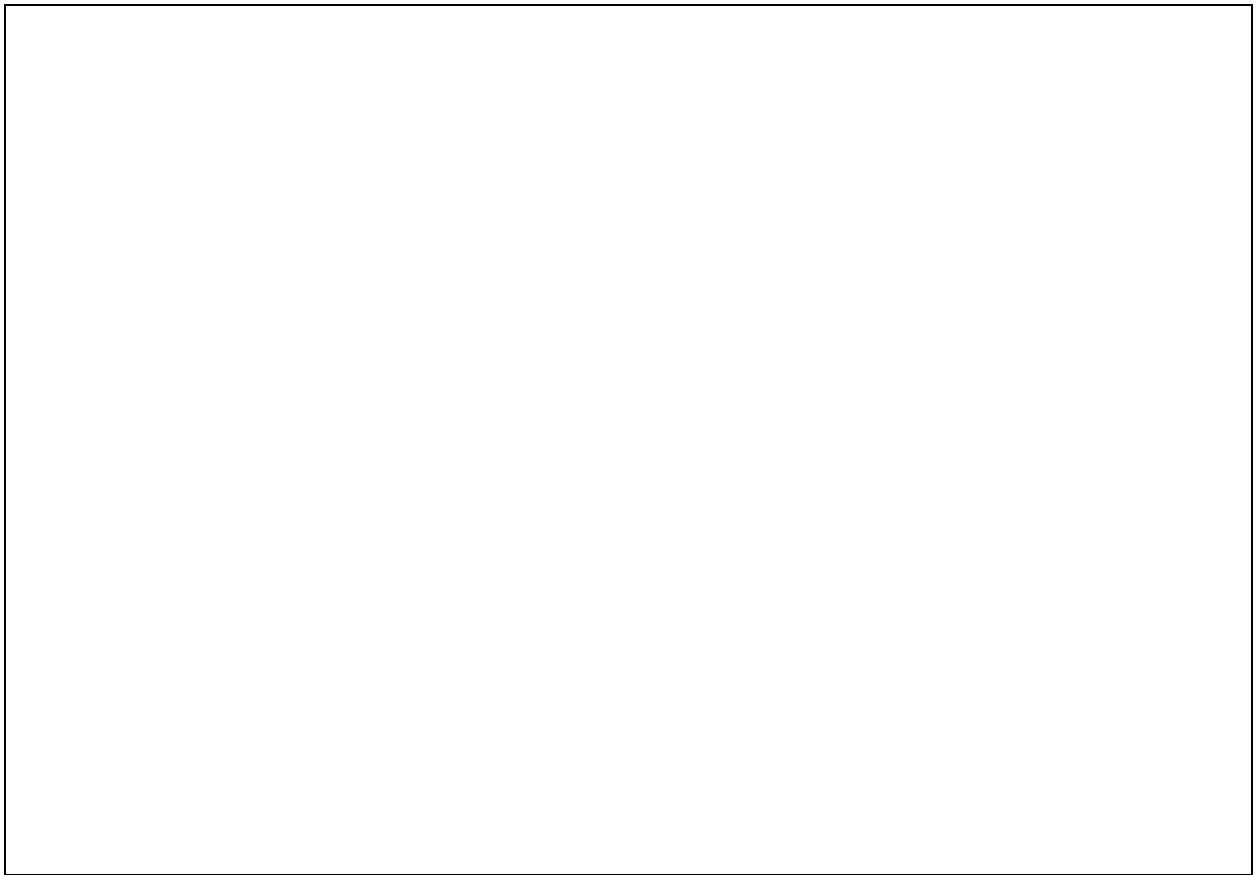
Answer: Please add your response here: 500 words max: Font Arial 11

Social value quality question/s: Scored Weighting 20%	
Question	Weighting
<p>2. Social gains for the school and the Trust</p> <p>Please give details of how your contract will deliver</p> <ol style="list-style-type: none"> 1. education enhancement for the school/local community 2. community engagement <p>If required, you may add some images/ that evidence your ability to deliver as a further attachment (not included in the word count)</p>	20%
<p>Answer: Please add your response here: 500 words max: Font Arial 11</p> <p>Appendix for diagrams or other supporting images with caption only texts. No more than 25 words.</p>	
Long term management quality question/s: Scored Weighting 20%	

Question	Weighting
3. Is there a mechanism to increase or decrease the PPA?	10%
Answer: Please add your response here: 500 words max: Font Arial 11	
4. What influence, if any does the school Trust have over the long term? Please give details of how your contract <ol style="list-style-type: none"> 1. Increases the PPA 2. Delivers long-term gains and if the school/Trust has any influence over the nature of the contract long term 	10%
Answer: Please add your response here: 500 words max: Font Arial 11	

Financial benefits question/s: Scored Weighting 5%	
Question	Weighting
<p>5. Financial benefits for the school and the Trust</p> <p>Please give details of how your contract will deliver</p> <p style="padding-left: 40px;">1. financial benefits for the Trust and School</p> <p style="padding-left: 40px;">If required, you may add some images/ that evidence your ability to deliver as a further attachment (not included in the word count)</p>	5%
<p>Answer: Please add your response here: 500 words max: Font Arial 11</p> <p>Appendix for diagrams or other supporting images with caption only texts. No more than 25 words.</p>	

Cost question/s: Scored Weighting 35%	
Question	Weighting
<p>6. What is the PPA for the school?</p> <p>Please give the initial PPA rate: _____ p/kWh</p> <p>Please indicate any mechanisms to alter this price that are part of the contract</p> <p>No claim from the supplier will be entertained by the Trust for any mistakes in setting the PPA rate. Please ensure that it covers any inflationary costs prior to installation or any contingency costs.</p>	<p>35%</p>
<p>Answer: Please add your response here: 250 words max: Font Arial 11</p> <div style="height: 150px;"></div>	



4 Standard requirements

Terms and conditions

Acceptance of the Quote

The quote provided shall constitute an irrevocable offer to perform the services. The successful supplier shall conclude a formal contract with the Trust, which shall embody the supplier's offer once consents from Department for Education have been secured.

The submission of the quote shall not in any way bind the Trust to enter into a contract with the supplier or involve the Trust in any financial commitment whatsoever in this respect. The Trust does not bind itself to accept the lowest, or any, quote.

Any acceptance of a quote by the Trust shall be in writing (email accepted).

Any acceptance of a quote is on the understanding that this does not bind the Trust to a single supplier or exclusive contract for the services supplied.

Rejection of a quote

The Trust may reject any quote and proposed solution that is:

1. Incomplete
2. Cannot adequately quantify the whole life costs
3. Introduces additional risk
4. Submitted later than the prescribed date and time
5. In breach of any condition that is a pass/fail category
6. Deemed to not have passed the company credit check which the Trust may undertake
7. The Trust may reject your bid if it contains caveats, conditions or any other statement or assumption qualifying the response, meaning that, in the reasonable opinion of the Trust, the supplier's response is not capable of evaluation in accordance with the published evaluation criteria.

Amendment to documents

Should any additions or deletions to the documents be considered necessary, prior to the date for submission of quotes, these will be issued by the Trust to those that have expressed an interest to submit a quote. The Trust reserves the right to extend the submission date accordingly.

Supplier's responsibilities

A supplier shall be deemed to have satisfied itself as to the accuracy and sufficiency of the information submitted as part of the quoting process. A supplier shall also be deemed to have obtained for itself all necessary information as to risks, contingencies and any other circumstances which might influence or affect its quote.

The supplier is responsible for all costs, expenses and liabilities incurred in connection with the preparation and submission of a quote.

Supplier's warranties

By submitting a quote, the supplier is confirming compliance with all of the requirements as detailed in this project specification. In particular that:

8. All information, representations and other matters of fact communicated (whether in writing or otherwise) to the Trust by the supplier or its employees, officers, agents or advisers in connection with, or arising out of, the process are true, complete and accurate in all respects.
9. The supplier has full power and authority to enter into the contract and provide the services, and will, if requested, produce evidence of such to the Trust.
10. The supplier is of sound financial standing and the supplier, its partners, directors, officers and employees are not aware of any circumstances which may adversely affect the financial standing in the future.

Trust's warranties and disclaimers

Whilst the information in this project proposal has been prepared in good faith, it does not purport to be comprehensive or to have been independently verified. With the exception of statements made fraudulently, the Trust does not accept any liability or responsibility for the adequacy, accuracy or completeness of such information. The Trust does not make any representation or warranty (express or implied) with respect to the information contained in the Invitation to Quote or to any written or oral information made available to any supplier or its professional advisors.

Each supplier to whom the invitation to quote is sent must take professional advice and undertake whatever investigation as it deems necessary, in order to make its own independent assessment of the proposed terms to determine its interest in the contract.

This invitation to quote is issued on the basis that nothing contained in it shall constitute an inducement or incentive nor shall have in any other way persuaded a supplier to submit a quote or enter into any other contractual agreement. Under no circumstances shall the Trust be liable to a supplier in respect of any costs incurred by a supplier (whether directly or otherwise) in relation to the preparation or submission of a quote.

The fact that a supplier has been invited to submit a quote does not necessarily mean that the supplier has completely satisfied all of the Trust's criteria. The Trust reserves the right to request further information as appropriate and to assess this as part of the evaluation process. The supplier shall have no claim whatsoever against the Trust in respect of such matters.

The Trust shall not make any payments to the successful supplier except as expressly provided for in the Contract.

Declaration

(To be signed and returned with the quote submission).

I / We accept the terms and conditions for submitting the quote

Name	
Role within the organisation	

Signature (electronic signature is acceptable)	
Date	