

Invitation to Tender (ITT)

The Mead Educational Trust

Date of Issue:
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ITT Contact

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1 Introduction

This is a private procurement to quote for the provision of Legal Services to The Mead Educational Trust (TMET), for **the period of 1 September 2024 to 31 August 2027** (inclusive) (Please refer to Appendix A – Legal Services Requirements 2024 for further details)

The Mead Educational Trust is a growing family of eight primary and five secondary schools in Leicester and Leicestershire. Our schools and central team share expertise, resources, and best practice across The Mead. We make decisions transparently and strategically, in the interest of all our schools.

With a record of strong school improvement and willingness to innovate and take risks, our Trust has earned a regional and national reputation for excellence.

More importantly though, we have always prioritised our young people and their needs. Our ethos and values have been fundamental to our development as an organisation, and we are especially proud of our core purpose: 'Together we make a positive difference'.

While each of our schools have their own identify, we are united in our commitment to our share values

2 Objective of the ITT

The Mead Educational Trust would like to invite qualified suppliers to respond to this ITT. This ITT document sets out the requirements and the selection criteria to be used in evaluation and provides information regarding how the tender process will be managed.

Failure to comply with the following instructions may result in a bid not being considered.

2.1 General Instructions

These instructions are designed to ensure that all proposals are given equal and fair consideration.

- The Mead Educational Trust will not be liable for or pay for expenses or losses that may be incurred by the Bidder in the preparation of the Bid.
- The Mead Educational Trust reserves the right to cancel the tender process at any point.
- A Bid received after the due date and time for submission will not be considered.
- The Mead Educational Trust does not bind itself to accept the lowest or any Bid.
- The Mead Educational Trust reserves the right to accept any Bid in whole or in part and may choose to split the award of contract accordingly.
- The prices quoted shall remain valid for acceptance for a minimum of 90 days from the tender return date.
- No Bid will be deemed to have been accepted unless such acceptance has been notified to the Bidder in writing.
- Incomplete bids will be deemed to be non-compliant and eliminated from evaluation.
- In the event of declining to Bid, Bidders are requested to inform The Mead Educational Trust.

- **Tenderers should note that the award of the contract is expected during June 2024**

Whilst the information in this document has been provided in good faith, it does not purport to be a comprehensive review of all matters relevant to the requirements and neither The Mead Educational Trust, nor any of its employees or advisers accept any liability or responsibility for its adequacy, accuracy or completeness, nor do any of them make any representation or warranty, express or implied, with respect to the information contained in this document. Nothing in this document is or should be relied upon, as a promise or representation as to The Mead Educational Trust's ultimate decision.

2.2 Evaluation criteria

The Bid process will be conducted in a manner that ensures Bids are evaluated fairly to ascertain the most economically advantageous Bid using the following criteria:

Criteria	Weighting
Company background, Experience and Indemnity	25
Proposed Team Qualifications and Experience	15
Proposed Key Performance Indicators (KPI's) / Service Delivery Measures (SDM)	25
Outcomes	20
Fees	15
TOTAL	100

Bidders should note that the overall weightings for each criterion are fixed. Details of criteria are:

2.3.1. Company background, Experience, and Indemnity – Weighting 25%

- 1 Bidders should provide details of the company's trading history, services provided, client base and an indication of the size and number of clients served annually (and in the academies sector) number of employees, location of sites and specific experience of delivering legal services to the Education sector.
- 2 Bidders should indicate any related or pecuniary interests with TMET Trustees, Key Personnel, or employees.
- 3 Bidders should provide information regarding any indemnity your organisation provides.

2.3.2 Proposed Team Qualification and Experience - Weighting 15%

To achieve the required quality standards and depth of cover, TMET expects inputs from qualified staff or suitably qualified professionals.

- 1 Bidders should provide details of the proposed delivery team; the actual personnel undertaking the work, along with relevant experience, qualifications, and their specific input to service provision / delivery and any other relevant information.
- 2 Bidders should provide details of a key / lead contact who will act as the relationship manager to the Trust.
- 3 Bidders should set out the added value you can provide to the Trust and a summary of the key reasons why we should appoint your firm.

2.3.3 Proposed Key Performance Indicators (KPI's) / Service Delivery Measures (SDM) – Weighting 25%

- 1 Bidders should set out the KPI's / SDM's that you typically establish / produce for your clients.

2.3.4 Outcomes – Weighting 20%

TMET are looking for a legal partner who can find solutions to difficult situations, where often the legal landscape is not clear. Can bidders provide an example of where:

- 1 They have been able to find a way through a complex legal matter to achieve your client's outcome: and
- 2 They have advised your client that there is no way forward and how you influenced them to understand this position.

2.3.5 Fees – Weighting 15%

Bidders should provide a breakdown of their fees for a 1-year contract and an alternative length of 2 or 3 years for each area; or

- 1 Your fees for a combined service for all or some of the areas, again over 1-, 2- or 3-year contract.
- 2 An indication of fee levels for additional schools joining the Trust showing the basis of this indication.

Bidders to provide at least one reference for legal services undertaken in the last two years ideally from a Trust.

2.4 Evaluation of Bids

The evaluation process will be conducted to identify the most economically advantageous tender. Bids will be assessed to ascertain those that represent best overall value and the highest likely quality of output during the contract, not necessarily the lowest price submission.

Proposals will be evaluated by The Mead Educational Trust.

Scoring Definitions

Each criterion will be scored using the following definitions:

SCORE	DEFINITION
0	Absent or does not meet the criterion.
1	Response has some major shortcomings and/or clear deficiencies, which on balance outweigh positive aspects of the response to the criterion.
2	Response has minor shortcomings and/or deficiencies, but on balance these are outweighed by the positive aspects that meet the majority of the criterion.
3	The criterion is fully met in all areas.
4	The response meets all aspects of the criterion and goes beyond them, adding significant value in a number of areas.

2.5 Questions and clarifications

If you have any questions or points of clarification about the contents of the Bid document or the services that are to be provided, please use the template attached as **Appendix B Questions and Clarifications Template** and submit, by the date shown below, in writing only by email to hparmar@tmet.uk

The Mead Educational Trust and its representative will not answer any questions received via telephone and will not answer any questions received after this date. Any questions received will be answered and circulated to all Bidders, although The Mead Educational Trust representative will not disclose the identity of the Bidder who asked the question.

Clarifications deadline : 12pm on 15 April 2024 Clarification response deadline : 4pm on 17 April 2024

2.6 Submission of Bid

Please submit your bid by email to hparmar@tmet.uk **by 12pm on 26 April 2024**

Any bids received after these dates and times will not be considered.

2.7 Timetable for Bid and award of Contract

The intended timetable is:

08 April 2024	Invitation to Tender document and associated documents issued to selected companies
10 April 2024	Recipients to show an expression of interest in submitting a bid for tender
By 12pm on 15 April 2024	Tenderers submit questions and comments regarding Tender documents.
By 4pm on 17 April 2024	The Mead Educational Trust responds to questions and comments via email to all Tenderers
By 12pm on 26 April 2024	Bidders submit Tender.
May 2024	Tenders are shortlisted
May 2024	Shortlisted tenderers invited to present to panel
June 2024	Contract Award (after approval by Executive Team)

3. List of Appendices

Appendix A: Legal Services Requirements 2024

Appendix B: Questions and Clarifications Template - Bidder to complete (optional)