



Exceed Learning Partnership

• EVERY CHILD • EVERY CHANCE • EVERY DAY •

Tender Specification for Hard Facilities Management and Statutory Compliance Services



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1. Introduction and Objectives

Exceed Learning Partnership is seeking a single Service Provider to deliver a high-quality, proactive Hard Facilities Management (FM) and Statutory Compliance service. The Trust currently comprises 10 academies across 12 sites (including a split-site secondary academy and a central office), all located within the Doncaster Region.

The primary objectives are:

- 100% Statutory Compliance: Zero tolerance for expired certifications across all sites.
- Preventative Focus: A PPM regime designed to reduce emergency reactive spend and prolong asset life.
- The "Golden Thread": A seamless digital audit trail of compliance documentation from inspection to remedial completion.
- Operational Continuity: Ensuring all works are delivered with minimal disruption to the educational environment.
- Centralised Governance: A unified annual compliance calendar that reduces local administrative burden and provides a successful platform for Trust-wide oversight.

1.1 Contract Term

- The Trust intends to award the contract for an initial period of two years, commencing 1st September 2026.
- Subject to satisfactory performance and at the sole discretion of the Trust, there will be an option to extend the contract for a further period of 12 months.
- The contract will include a six (6) month "No Fault" termination clause for both parties to ensure long-term flexibility and risk management.
- The Trust is keen to enter into a fixed price contract for the initial period of two years.

2. Scope of Services

The Provider shall be responsible for all "Hard FM" services, including the management, execution, and certification of all statutory and non-statutory maintenance. The Provider must deliver a PPM schedule in accordance with SFG20 standards and the DfE's Good Estate Management for Schools (GEMS) framework.

2.1 Mechanical & Specialist Services:

- Heating: Annual boiler servicing, pressure vessel inspections, and gas safety (CP12).
- Kitchens: Annual gas safety for kitchen burners/boilers, gas proving systems, and 6-monthly kitchen fire suppression system servicing.
- Air Safety: Annual Fire Damper testing/inspection (BS 9999) and 6-monthly Air Conditioning (HVAC/AHU) servicing and filter changes.
- Ductwork: Annual Kitchen Extract/Duct cleaning and TR19 certification.
- LEV: Mandatory COSHH inspections for D&T dust extraction and Science Lab fume cupboards.

2.2 Electrical & Life Safety:

- Fixed Wire (EICR): A 5-year rolling programme.
- Emergency Lighting: Monthly functional tests and annual full-discharge tests.
- Fire Safety: 6-monthly Fire Alarm inspections and 6-monthly Fire Door condition audits.
- Other: Annual PAT testing, 11-monthly Lightning Conductor testing, and Annual Lockdown Alarm servicing.

2.3 Water, Fabric and Asbestos:

- Water Hygiene: Legionella monitoring (ACOP L8), monthly temps, annual TMV servicing, and 2-yearly LRA reviews.
- Asbestos Management: Annual Asbestos Management Audits/Inspections across all 12 sites to ensure the Management Plan is current and updated where required.
- Glazing: Regulation 14 (Impact Safety) audits.
- Vertical Transport: LOLER inspections and 6-monthly lift servicing.
- External: 6-monthly pumping station maintenance and annual playground safety inspections.

2.4 Reactive Maintenance and Repairs

The Provider shall operate a 24/7/365 emergency helpdesk.

- Priority 1 (Emergency): 2-hour response / 4-hour make-safe. (e.g., Gas leak, total power failure, water loss, major flood).
- Priority 2 (Urgent): 4-hour response / 24-hour resolution. (e.g., Partial heating loss, fire alarm fault, kitchen equipment failure).
- Priority 3 (Routine): 5-working-day resolution. (e.g., Non-critical fabric repairs).

It is expected that the PPM Fee shall be inclusive of all minor consumables (fuses, washers, filters, lubricants, and small fixings) up to a value of £50 per task. Items exceeding this value shall be treated as reactive.

3. Asset Management & The CAFM System

Within the first 90 days, the Provider shall establish a verified Trust-wide Asset Register.

3.1 Digital "Golden Thread"

- The Provider must operate a CAFM system that acts as the single source of truth.
- Data Sovereignty: All data, including asset registers and certificates, remains the property of the Trust and must be exportable in .csv/.xlsx format at no cost upon contract exit.
- Real-time Visibility: The Trust must have access to a dashboard showing "Red/Amber/Green" status for all compliance areas.
- Evidence Upload: All statutory certificates must be uploaded within 5 working days of the site visit.

4. Safeguarding and Site Protocols

- Strict adherence to Keeping Children Safe in Education (KCSIE) is a condition of contract.
- Enhanced DBS: All staff and sub-contractors must hold a valid Enhanced DBS check and be provided before any entry onto a Trust site.
- Identification: High-visibility vests and photo ID badges must be worn at all times.
- Site Records: Engineers must sign in at reception and must read and sign the Asbestos Register before commencing work. No work is to commence until the Asbestos Register has been consulted for the specific work area.
- The Trust expects a Single Central Record (SCR) compliant spreadsheet from the provider monthly.

5. Contract Management and KPIs

Performance shall be monitored monthly. Failure to meet targets will result in Service Credits (financial deductions).

| KPI Ref | Service Level | Target | Penalty if missed |
|---------|-------------------------------|--------|---|
| KPI 1 | Statutory Compliance | 100% | 10% of the PPM Fee Deducted for that area of work |
| KPI 2 | Priority 1 Response (2 Hours) | 98% | 25% of the call out fee Deducted. |
| KPI 3 | Doc Upload (5 Days) | 95% | £50 per document, per day overdue to be reduced off next invoice. |
| KPI 4 | First Time Fix Rate | 85% | Formal Performance Improvement Plan |

5.1 Invoicing and Financial Procedures

Centralised Invoicing: To reduce administrative burden, the Provider shall submit one consolidated monthly invoice to the Trust's Central Finance Team.

Site Breakdown: The consolidated invoice must be accompanied by a backing sheet breaking down costs by individual Academy/Site and identifying PPM vs. Reactive spend.

Purchase Orders: No works are to be undertaken without a valid Purchase Order (PO) number, which must be quoted on all invoices.

Payment Terms: The Trust operates on standard 30-day payment terms from the date of a valid invoice.

Quote Thresholds: For reactive works exceeding the consumable limit, the Provider must submit a formal quote for approval by the Trust/Academy Lead before commencing work.

6. Information Required from Bidders

Bidders must produce and submit two documents:

Document A: Pricing Schedule

Please ensure your pricing schedule details the following:

- Section 1: Fixed Annual PPM Fee per school detailing all aspects included within the specification (inclusive of consumables less than £50). If you are not providing quotes for areas of the specification, please detail accordingly as an exclusion.
- Section 2: Hourly Labour Rates for reactive works (Electrician, Plumber, Gas Engineer, Fabric Tech).
- Section 3: Detail if there would be any percentage markup on materials as part of reactive works
- Section 4: Management/Helpdesk Fees (if not embedded in PPM costs).

Please ensure the schedule is broken down per site (site details listed within the appendix)

Document B: The Proposal (Split into 6 sections and a maximum of 20 Pages)

- Section 1: Organisation Fit & Experience: Provide details about your organisation, your experience and how you will meet the requirements set out in specification and provide the highest levels of service that the Trust requires.
- Section 2: Provide 2 case studies of either working with another Multi Academy Trust or working across similar complex sites.
- Section 3: Mobilisation: Provide mobilisation plan including a 90-day Gantt chart and how you will approach and ensure successful asset verification.
- Section 4: Technology: Provide an overview of your CAFM systems, specifically demonstrating how the RAG dashboard and automated alerts will ensure 100% statutory compliance for the Trust
- Section 5: Provide details on how you will ensure that your employees and your sub-contractors are thorough vetted, have enhanced DBS and all the appropriate accreditations. Please note, the Trust expects a Single Central Record (SCR) compliant spreadsheet from the provider monthly.
- Section 6: Please provide details of your Social Value offer and Specific commitments to our Pupils (STEM/Sustainability).

7. Tender Evaluation and Scoring Criteria

The Trust will score each Tender based on a weighting of 40% Price and 60% Quality.

Price Evaluation (40% Total Weighting)

Document A Pricing will be scored based on the following weighting:

- PPM Fees (30%): The lowest total annual PPM price will receive the full 30 points. Other bids will be scored pro-rata using the formula: ***(Lowest Price / Bidder Price) x 30***.
- Hourly Rates & Markups (10%): Evaluated against a benchmark basket of reactive maintenance scenarios to ensure transparent value for money.

Quality Evaluation (60% Total Weighting)

Each section of Document B: The Proposal will be scored based on the following weightings:

| Section | Criteria | Weighting |
|-----------|--|-----------|
| Section 1 | Organisation Fit & Experience (Demonstrated MAT expertise) | 10% |
| Section 2 | Case Studies (Proven track record in similar environments) | 10% |
| Section 3 | Mobilisation & Asset Verification (Ensuring data accuracy) | 15% |
| Section 4 | Technology & CAFM (Dashboard, RAG reporting, Golden Thread) | 10% |
| Section 5 | Safeguarding & Vetting (DBS, SCR compliance, site protocols) | 10% |
| Section 6 | Social Value (Commitments to STEM and Sustainability) | 5% |

7.1 Scoring Methodology

Each Quality section in Document B will be awarded a score from 0 to 5 based on the following matrix:

| Score | Rating | Criteria |
|-------|---------------------------|--|
| 5 | Excellent | Exceptional response. Provides full detail and extensive evidence. Demonstrates significant added value or innovative approaches that exceed the Trust's requirements. |
| 4 | Good | Comprehensive response. Fully meets the requirements with good supporting evidence. Demonstrates a clear understanding of the Trust's needs with no omissions. |
| 3 | Satisfactory | Meets the requirements. The response is adequate and provides enough detail to be acceptable, but lacks "added value" or highly specific evidence. |
| 2 | Minor Reservations | The response meets some requirements but lacks sufficient detail, evidence, or clarity in key areas. Minor concerns regarding the provider's ability to deliver. |
| 1 | Major Reservations | Poor response. Significant lack of detail or evidence. Fails to meet the requirements in several areas, leading to major concerns about delivery. |
| 0 | Unacceptable | No response provided, or the response fails to address the requirement entirely. |

Following the initial evaluation, the highest-scoring Tenders will be invited to a presentation. This session will focus on a live demonstration of the CAFM dashboard, the mobilisation project plan, and a Q&A with the Trust Leadership Team in order to moderate the initial submission.

8. Procurement Timeline

- **Tender Goes Live:** Monday 23rd February 2026
- **Site Visits (Optional):** Monday 2nd March 2026 – Friday 10th April 2026 – to book a site visit please email procurement@elp.org.uk
- **Clarification Deadline:** 5pm on Monday 30th March 2026
- **Tender Submission Deadline: 5pm on Tuesday 14th April 2026**
- **Shortlist Presentations:** Thursday 23rd April – Friday 15th May 2026 – Tenders will be shortlisted and invited to present in person to the Trust Leadership Team.
- **Contract Award:** By Friday 22nd May 2026
- **Contract Start (Go-Live):** Tuesday 1st September 2026

Submission Instructions:

All submissions must be emailed to procurement@elp.org.uk by the deadline above. If file sizes exceed 20MB, please send via a secure file transfer link (e.g., WeTransfer) to the same address and include a separate email to this address stating you have submitted via a secure file transfer.

Appendix: Site Locations & Addresses

| Academy Name | Site Type | Address | Postcode |
|------------------------------------|--------------------------|---|----------|
| Exceed Learning Partnership | Central Office | 6-9 Railway Court, Doncaster | DN4 5FB |
| Hall Cross Academy | Secondary (Upper School) | Thorne Road, Doncaster | DN1 2HY |
| Hall Cross Academy | Secondary (Lower School) | Saint Sepulchre Gate West, Doncaster | DN1 3AL |
| Carr Lodge Academy | Primary | Grady Drive, Balby, Doncaster | DN4 8GA |
| Bentley High Street Primary | Primary | High Street, Bentley, Doncaster | DN5 0AA |
| Hill Top Academy | Primary | Edlington Lane, Edlington, Doncaster | DN12 1PL |
| Edlington Victoria Academy | Primary | Victoria Road, Edlington, Doncaster | DN12 1BN |
| Rosedale Primary School | Primary | Emley Drive, Scawsby, Doncaster | DN5 8RL |
| Willow Primary School | Primary | Alston Road, Bessacarr, Doncaster | DN4 7EZ |
| Sandringham Primary School | Primary | Sandringham Road, Intake, Doncaster | DN2 5LS |
| Sheep Dip Lane Academy | Primary | Sheep Dip Lane, Dunscroft, Doncaster | DN7 4AU |
| The Mallard Academy | Primary | Cedar Road, Balby, Doncaster | DN4 9HU |