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DEMONSTRATION DOCUMENT – EXAMPLE, NOT SUBMITTED

TURNKEY TENDER · LEVEL WITH TECHNICAL OFFER

Complete worked example based on a real tender

Catering Services: school catering services across nine schools of Connect Academy Trust in Plymouth, Torquay and Newton Abbot (reference CONNECT2026-1)

Contracting authority	Connect Academy Trust
Notice	UK4 tender notice 2026/S 000-096984, Procurement Act 2023 (tender deadline passed on 23 November 2026)
Award	Most advantageous tender: quality 75%, commercial proposal 25%
Bidder	Example Services Ltd, a fictitious company: registration numbers, data and signatures are placeholders
Contents	Requirements checklist, supplier information and PSQ, declarations, quality response criterion by criterion, Pricing Schedule, signing and submission checklist, documents to obtain, checks

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This tender has not been submitted and contains no data relating to real companies. The documents cited are public and linked in document 1. Unicorn Contracts is a service of Unicorn Private LLC · contracts.unicornprivate.com

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All documents for the contracting authority are ready to sign: the company reads them again, signs them and sends them as the tender notice requires. The dashed boxes "Note for the client" and documents 7, 8 and 9 are for the client and are not submitted.

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1. Tender summary and sources

Contracting authority	Connect Academy Trust, a multi-academy trust in Devon (Companies House 10192252; Public Procurement Organisation Number PTBZ-8727-CCZW), Leigham Primary School, Cockington Close, Plymouth PL6 8RF
Subject	Catering Services: school catering services across nine schools of Connect Academy Trust in Plymouth, Torquay and Newton Abbot (reference CONNECT2026-1)
Notice	UK4 tender notice under the Procurement Act 2023, published on Find a Tender (Central Digital Platform) on 14 October 2026 as 2026/S 000-096984; edited on 4 November 2026 (current version 2026/S 000-104533); OCID ocds-h6vhtk-078782
Procedure	Notice: "Below threshold - open competition", special regime "Light touch"; the notice description refers to the Competitive Flexible Procedure (section 20(2)(b) of the Act); the Invitation to Tender (ITT, section 3) and the specification (section 16) describe two stages. See document 9 for this inconsistency.
Award criteria (most advantageous tender)	Service Quality 30% · Commercial Proposal 25% · Mobilisation & TUPE 10% · Social Value 15% · Sustainability 15% · Innovation & Added Value 5% (quality 75%, price 25%)
Estimated value	£850,000 excluding VAT, £1,020,000 including VAT, described as "current value of contract" and flagged "Below the relevant threshold"
CPV and participation	55520000 Catering services (light touch service under Schedule 1 to the Procurement Regulations 2024); reserved for UK suppliers; suitable for SMEs
Term	1 April 2027 to 31 March 2030, possible extension to 31 March 2032 (two periods of 12 months)
Deadlines	Clarifications: 16 November 2026, 11:59pm (originally 2 November). Tenders: 23 November 2026, 11:59pm (originally 16 November, extended because the TUPE information was still awaited). **Deadline passed.**
Submission	By email to the address stated in the tender notice; the notice states "Tenders may be submitted electronically: No"

Why this tender. It is a real procurement, already closed, published under the Procurement Act 2023 with weighted award criteria, a written quality response, a supplier questionnaire linked to the Central Digital Platform and a pricing schedule: a typical case of the "with technical offer" level. The bidder, its data, the prices and the signatures are **invented**: this tender has never been submitted. For a live tender only the official documents count.

Public documents consulted

- Tender notice, first version: find-tender.service.gov.uk/Notice/096984-2026
- Tender notice, edited version of 4 November 2026: find-tender.service.gov.uk/Notice/104533-2026
- Catering Services Tender Specification 2026 (Word, 18 sections and Appendices A to E): Attachment A-24087
- 01 Invitation to Tender and Supplier Instructions (4 pages): Attachment A-25143
- 02 Procurement Specific Questionnaire (PSQ, 5 pages): Attachment A-25144
- 04 Catering Pricing Schedule (Excel, 5 sheets): Attachment A-25145

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2. Requirements checklist with outcome

Contracting authority: Connect Academy Trust (Companies House 10192252) · **Reference:** CONNECT2026-1 · **Notice:** 2026/S 000-096984 (edited as 2026/S 000-104533) · **OCID:** ocds-h6vhtk-078782
Subject: Catering Services: school catering services across nine schools of Connect Academy Trust in Plymouth, Torquay and Newton Abbot (reference CONNECT2026-1)

Each requirement of the tender documents compared with the profile of Example Services Ltd (fictitious company, SME, 140 employees, school and workplace catering in Devon and Cornwall). Outcome: **Met** = held and declared; **Evidence to prepare** = held, the evidence must be ready for verification; **To do** = action before submission; **Not applicable**.

Requirement	Source	Position of Example Services Ltd	Outcome
No mandatory or discretionary exclusion ground (Schedules 6 and 7 to the Act); not on the debarment list	Spec. 14; ITT 8; PSQ A5	No ground applies to the company or its connected persons; not on the debarment list (section 62).	**Met**
Registration on the Central Digital Platform, core supplier information complete and shared with the Trust	ITT 3; PSQ 1.1	Registered; basic, financial standing, connected person and exclusion information to be updated and shared before the deadline.	**To do (action)**
UK supplier (procurement reserved)	Notice, Participation	Company registered in England and Wales, Companies House 00000000 (placeholder).	**Met**
Financial standing: accounts for the past 3 years, cash flow and budget assumptions	PSQ 3A.1 to 3A.3	Turnover 2023 £5.4m, 2024 £5.8m, 2025 £6.2m (example figures); no going-concern qualification.	**Evidence to prepare**
Employer's, public and product liability insurance	Spec. 14; PSQ 3B	Employer's liability £10m, public and product liability £5m (example levels); cover confirmed for the whole term.	**Evidence to prepare**
Up to three comparable contracts in the last 3 years, with referees	PSQ 3C.1	Three school catering contracts with anonymous public clients A, B and C (example), 4 to 11 sites each.	**Evidence to prepare**
Capability across nine schools in Plymouth, Torbay and Newton Abbot	PSQ 3C.2	Area manager based in Plymouth, relief cooks pool, central kitchen support in Exeter.	**Met**
Food safety management (HACCP), hygiene training, audits	Spec. 7; PSQ 3C.3	HACCP-based system, Level 2 and Level 3 food hygiene training, food hygiene rating 5 at all current sites (example).	**Evidence to prepare**
Health and safety arrangements	Spec. 14; PSQ 3C.6	Policy, risk assessments for each kitchen, competent adviser.	**Evidence to prepare**
Allergen management and special diets	Spec. 7; PSQ 3C.4	Written allergen procedure, photo-card system for pupils with medical diets, annual allergen training.	**Met**
Safeguarding and safer recruitment (DBS)	Spec. 7; PSQ 3C.5	Enhanced DBS checks with barred list check for all school-based staff; designated safeguarding lead.	**Met**
TUPE and Local Government Pension Scheme (admitted body status)	Spec. 8; PSQ 3C.7	Experience of three TUPE transfers with LGPS admission agreements; employee liability information still awaited from the Trust.	**To do (action)**

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Requirement	Source	Position of Example Services Ltd	Outcome
Data protection (UK GDPR and Data Protection Act 2018)	Spec. 11; PSQ 3C.8	Registered with the ICO; data protection policy and breach procedure.	**Met**
Modern slavery, equality, diversity and inclusion	Spec. 14; PSQ 3C.9	Voluntary modern slavery statement (turnover below the £36m threshold of section 54 of the Modern Slavery Act 2015); equality policy.	**Met**
Subcontractors and associated persons declared	PSQ 2A, 2B	No associated person; one intended subcontractor (kitchen extract cleaning), not yet appointed.	**Met**
Tender security or bond	ITT; Spec. (no provision)	The documents do not ask for a bid bond or guarantee.	**Not applicable**
Food tasting, presentation and Q&A	Spec. 5.1 and 16; ITT 7	Possible for shortlisted suppliers in January 2027; the team is ready to attend.	**Not applicable at this stage**

Overall outcome: the company meets all participation requirements. The items marked "Evidence to prepare" and "To do" are listed in document 8.

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PSQ (DOCUMENT 02 OF THE TRUST) · CORE SUPPLIER INFORMATION SHARED THROUGH THE CENTRAL DIGITAL PLATFORM

3. Supplier information: Central Digital Platform and PSQ

Contracting authority: Connect Academy Trust (Companies House 10192252) · **Reference:** CONNECT2026-1 · **Notice:** 2026/S 000-096984 (edited as 2026/S 000-104533) · **OCID:** ocds-h6vhtk-078782
Subject: Catering Services: school catering services across nine schools of Connect Academy Trust in Plymouth, Torquay and Newton Abbot (reference CONNECT2026-1)

Under the Procurement Act 2023 there is no ESPD: the supplier keeps its core supplier information on the Central Digital Platform (regulations 6 and 9 to 12 of the Procurement Regulations 2024) and answers the Trust's Procurement Specific Questionnaire. The information below is updated and shared with Connect Academy Trust through the platform before the tender deadline.

Core supplier information on the Central Digital Platform

Basic information (reg. 9)	Example Services Ltd (fictitious company), private limited company, Companies House 00000000, VAT GB 000 0000 00, unique identifier XXXX-0000-XXXX (all placeholders); registered office 1 Example Street, Exeter EX0 0XX (placeholder); SME (140 staff, turnover below £44m)
Economic and financial standing (reg. 10)	Accounts for the financial years 2023, 2024 and 2025 uploaded (example figures in document 2)
Connected persons (reg. 11)	Directors: Name Surname (placeholder), Name Surname (placeholder); person with significant control: Name Surname (placeholder); no parent company
Exclusion grounds (reg. 12)	No mandatory ground (Schedule 6) and no discretionary ground (Schedule 7) applies to the supplier or to its connected persons

A. Preliminary information

No.	Question	Response
A1, A2	Name, identifier, registration	Example Services Ltd, no different trading name; XXXX-0000-XXXX; Companies House 00000000 (placeholders)
A3	Address and contact	1 Example Street, Exeter EX0 0XX; Bid Manager, Name Surname (placeholder), tenders@exampleservices.example, 01000 000000
A4	Form of bid	Single supplier; one intended subcontractor (see 2B)
A5, A6	Debarment list; tender pack reviewed	No; yes, instructions accepted without qualification

Parts 1, 2A and 2B

No.	Response
1.1, 1.2	Yes: registered, core supplier information up to date and shared with Connect Academy Trust (1.2 not applicable).
2A.1 to 2A.5	No associated persons are relied upon to meet the conditions of participation: None.
2B	Intended subcontract: specialist cleaning of kitchen extract systems (to the TR19 Grease standard of BESA) twice a year, if this falls within the supplier's responsibilities in the final responsibility matrix. The subcontractor is not yet appointed because the responsibility matrix is not yet published; details will be provided before contract award. (2B.2, 2B.4) It will not be on the debarment list and is not an associated person.

Part 3. Conditions of participation (summary of responses)

No.	Response
3A.1 to 3A.3	Accounts 2023 to 2025 shared through the platform; cash flow forecast and budget assumptions for 2027 to 2032 attached; no material adverse financial event, no insolvency process.
3B.1, 3B.2	Employer's liability £10,000,000; public liability £5,000,000; product liability £5,000,000 (example insurer and expiry dates); no exclusion for school catering; cover maintained throughout the contract.
3C.1	(1) Primary school catering, public client A (example), multi-academy trust, 7 schools, 2023 to date, value band £0.5m to £1m a year; (2) school and nursery catering, public client B (example), 11 sites, 2024 to date, band £1m to £2m a year; (3) school catering with TUPE transfer, public client C (example), 4 schools, 2023 to date, band £250k to £500k a year. Referees: Name Surname (placeholder) for each, with permission to contact.
3C.2	Two area managers (Plymouth; Torbay and Newton Abbot), relief cooks pool of five, central support in Exeter, approved food suppliers with second sources, written contingency plans for staff absence, equipment failure and supply disruption.
3C.3	HACCP-based food safety management system in every kitchen; Level 2 food hygiene for all staff, Level 3 for head cooks; independent audits twice a year; food hygiene rating 5 at all current sites (example).
3C.4	Written allergen procedure for the 14 regulated allergens; medical diets on signed plans with photo cards; controlled menu and allergen information; serious incidents escalated to the school immediately.
3C.5	Safer recruitment; enhanced DBS with barred list check for all school-based staff; annual safeguarding training; designated safeguarding lead.
3C.6	Health and safety policy reviewed annually; written risk assessments for each kitchen; incidents reported under RIDDOR; competent health and safety adviser; manual handling and COSHH training.
3C.7	Three TUPE transfers with LGPS admission agreements in the last 3 years; consultation, training and mobilisation plan for 1 April 2027; dependency: admission agreement with the relevant LGPS fund.
3C.8	ICO registration; UK GDPR and Data Protection Act 2018 policy; role-based access to pupil and staff data; breach reporting within 24 hours to the Trust; data processing terms with subcontractors.
3C.9	Voluntary modern slavery statement; supplier code of conduct and annual supply-chain risk review; equality, diversity and inclusion policy applied to recruitment and service delivery.

Part 4. Supplier declarations

The undersigned confirms the six declarations of Part 4 of the PSQ: the information is accurate and complete; the Trust may verify it, check the Central Digital Platform and the debarment list and contact referees; any change relevant to exclusions, associated persons, subcontractors or conditions of participation will be notified promptly; conflicts of interest have been disclosed; a supplier that does not satisfy a published condition of participation may be excluded from participating or progressing in accordance with the published procedure and applicable law; the supplier understands that conditions of participation and award criteria are separate.

Exeter, date of signature
Authorised signatory: Name Surname (placeholder), Managing Director, for and on behalf of Example Services Ltd
To be signed by the authorised signatory (electronic signature or signed PDF). The authorised signatory reviews the document before signing it and takes responsibility for it.

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FORM OF TENDER, APPENDIX E OF THE SPECIFICATION, CONFLICT OF INTEREST AND CONFIDENTIALITY STATEMENTS

4. Administrative declarations

Contracting authority: Connect Academy Trust (Companies House 10192252) · **Reference:** CONNECT2026-1 · **Notice:** 2026/S 000-096984 (edited as 2026/S 000-104533) · **OCID:** ocds-h6vhtk-078782
Subject: Catering Services: school catering services across nine schools of Connect Academy Trust in Plymouth, Torquay and Newton Abbot (reference CONNECT2026-1)

Form of tender

To: Connect Academy Trust. We, Example Services Ltd, registered in England and Wales under number 00000000 (placeholder), having examined the tender notice, the Catering Services Tender Specification, the Invitation to Tender, the Procurement Specific Questionnaire, the Pricing Schedule and all clarifications published, offer to provide the catering services across the nine schools of the Trust from 1 April 2027 in accordance with those documents, at the prices set out in our completed Pricing Schedule.

1. Our tender remains valid for acceptance for 120 days from the tender deadline.
2. Our prices are in pounds sterling, with VAT shown separately, and include all costs needed to meet the specification except the items listed in the Assumptions sheet.
3. We have stated all assumptions, dependencies and exclusions in the designated schedules and do not qualify our tender in general terms (ITT, section 5).
4. We accept that the Trust is not bound to accept the lowest-priced tender or any tender.
5. We will enter into the final contract and schedules if our tender is successful.

Exeter, date of signature
Authorised signatory: Name Surname (placeholder), Managing Director, for and on behalf of Example Services Ltd
To be signed by the authorised signatory (electronic signature or signed PDF). The authorised signatory reviews the document before signing it and takes responsibility for it.

Supplier declaration (Appendix E of the specification)

By submitting this tender, Example Services Ltd confirms that: the information provided is accurate and complete to the best of its knowledge; it has reviewed the tender documents and has sought clarification through the prescribed process where required; it has declared all relevant conflicts of interest; it will maintain confidentiality over commercially sensitive information; it will comply with applicable law and the final contract; it has priced the requirement on the basis of the information supplied and has clearly identified assumptions and exclusions; it understands that the Trust is not bound to accept the lowest-priced tender; it understands that the Trust may reject a tender that does not comply with the stated requirements.

Legal name	Example Services Ltd
Company / registration number	00000000 (placeholder)
Authorised representative	Name Surname (placeholder)
Position	Managing Director
Signature	(to be signed)
Date	(date of signature)

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Conflict of interest declaration

Example Services Ltd declares that, to the best of its knowledge after reasonable enquiry, no director, employee or associated person has a personal, financial or family relationship with any trustee, member of staff or evaluator of Connect Academy Trust, and that it has received no information about this procurement that is not available to all suppliers. Any conflict that arises later will be notified to the Trust promptly.

Confidentiality statement

The following information is commercially sensitive and should be withheld if disclosure is requested: the unit costs in the Pricing Schedule and the relief staffing arrangements in section 3 of the quality response, because their disclosure would harm the supplier's commercial interests in other procurements. All other parts of the tender may be disclosed.

TUPE acknowledgement

Example Services Ltd acknowledges that the Transfer of Undertakings (Protection of Employment) Regulations 2006 are expected to apply, that employees may participate in the Local Government Pension Scheme and that it will seek admitted body status or an equivalent arrangement. As the employee liability information was not issued before the deadline, the labour costs rest on the assumptions stated in the Assumptions sheet, to be confirmed once the information is received.

Exeter, date of signature

Authorised signatory: Name Surname (placeholder), Managing Director, for and on behalf of Example Services Ltd

To be signed by the authorised signatory (electronic signature or signed PDF). The authorised signatory reviews the document before signing it and takes responsibility for it.

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TECHNICAL TENDER RESPONSE · STRUCTURED ON THE HEADINGS OF SECTION 17 OF THE SPECIFICATION · NO WORD OR PAGE LIMIT PUBLISHED · THIS RESPONSE IS ABOUT 4 PAGES

5. Quality response

Contracting authority: Connect Academy Trust (Companies House 10192252) · **Reference:** CONNECT2026-1 · **Notice:** 2026/S 000-096984 (edited as 2026/S 000-104533) · **OCID:** ocds-h6vhtk-078782
Subject: Catering Services: school catering services across nine schools of Connect Academy Trust in Plymouth, Torquay and Newton Abbot (reference CONNECT2026-1)

Award criteria and where the response is

Award criterion	Matters assessed (notice, ITT 7, spec. 16)	Weight	Section
Service Quality	Menus and nutrition; pupil engagement; FSM/UIFSM strategy; staffing and management; customer service; allergy and special diets	30%	3, 4, 5, 6
Commercial Proposal	Total evaluated cost, transparency, assumptions	25%	Pricing Schedule (document 6)
Mobilisation & TUPE	TUPE; training and retention; communications; implementation plan	10%	7, 12
Social Value	Local employment; apprenticeships; community engagement; educational activities	15%	9
Sustainability	Food miles and sourcing; carbon; food waste; packaging	15%	8
Innovation & Added Value	Innovation, technology, curriculum links, uptake, continuous improvement	5%	11, 13, 14

Sections 1 and 2 of section 17 of the specification (supplier profile and experience) are in the PSQ (document 3); section 10 is the Pricing Schedule; section 15 is in document 4. No price or cost appears in this response.

3. Service delivery: operating approach and management (Service Quality)

NOTE FOR THE CLIENT, NOT PART OF THE TEXT TO BE SUBMITTED
What the Trust assesses: named senior contract manager, area support across Plymouth, Torbay and Newton Abbot, escalation, consistent standards with local flexibility, contingency (spec. 4.1).

Two clusters, one standard. Plymouth cluster (Eggbuckland Vale, Leigham, Manadon Vale, Thornbury, Widey Court) and Torbay and Newton Abbot cluster (Cockington, Eden Park, Preston, Haytor View). A named contract manager with authority to resolve operational, staffing and financial issues; an area manager for each cluster visiting every kitchen at least once a fortnight; a head cook in each school. Relief cooks (three in Plymouth, two in Torbay) cover absence on the same day.

Verifiable commitment	Measure
Meeting with each Headteacher or nominated contact	each half term, with written actions
Contract review with the COO/CFO	monthly, with the management information pack
Escalation of a safeguarding, food safety or serious allergen incident	to the school immediately and to the Trust within 1 hour

Verifiable commitment	Measure
Meal service on agreed school days	100%, with cold-meal contingency menu held at every school
Complaints	acknowledged within 1 school day, resolved within 5 school days, logged in the monthly pack

4. Food and menus (Service Quality)

NOTE FOR THE CLIENT, NOT PART OF THE TEXT TO BE SUBMITTED
What the Trust assesses: balanced, appealing menus for primary pupils, compliance with the school food standards, fresh and seasonal food, vegetarian options, menus that evolve with pupil feedback and uptake data, themed menus (spec. 5).

- **Standards.** Three-week menu cycle, changed twice a year (spring/summer and autumn/winter), compliant with the Requirements for School Food Regulations 2014; nutritional analysis of every recipe shared with the Trust before each cycle.
- **Fresh food.** Main dishes cooked on site from fresh ingredients; at least 60% of main components fresh or minimally processed; a daily vegetarian main dish and a meat-free day each week.
- **Pupil voice.** School food council in each school meeting each term; "taste and tell" sessions before each new cycle; dishes with uptake below 15% of the day's meals reviewed and replaced.
- **Curriculum links.** One themed day per half term (for example harvest, world foods, British food fortnight) agreed with the school.

5. Free school meals and uptake (Service Quality)

NOTE FOR THE CLIENT, NOT PART OF THE TEXT TO BE SUBMITTED
What the Trust assesses: stigma-free offer, communications to parents and carers, use of uptake data, reporting by school and meal category, support with meal claims (spec. 6).

All pupils see the same menu and the same service; payment status is never visible at the counter. Each autumn term, with each school, a campaign to parents and carers explains free school meal eligibility and how to apply, including families newly eligible since the extension of free school meals to all households receiving Universal Credit (September 2026). Monthly uptake reports by school and category (paid, universal infant free school meals, free school meals, adults) are reconciled with the school's meal registers before invoicing.

Uptake commitment	Target
Baseline	measured by school in the first half term (from the Trust's annual meal figures)
Paid meal uptake (Key Stage 2)	+5 percentage points by the end of year 1
Universal infant free school meal uptake	at least 90% of eligible pupils in each school by the end of year 1

6. Allergens and food safety (Service Quality)

NOTE FOR THE CLIENT, NOT PART OF THE TEXT TO BE SUBMITTED
What the Trust assesses: allergen system, accurate allergen information, special diets, staff competence, HACCP, escalation of incidents (spec. 7).

- **Allergens.** Allergen information for the 14 regulated allergens for every dish, held at the counter and published to parents; medical diets only on a written plan signed by parents, with a photo card at the counter and a separately prepared, labelled meal; prepacked for direct sale items labelled in full.

- **Food safety.** HACCP-based food safety management system in each kitchen, daily temperature records, independent audit twice a year; target food hygiene rating of 5 at all nine kitchens.
- **Incidents.** Any allergen near miss is recorded and investigated within 48 hours, with a report to the school and the Trust.

7. Staffing and TUPE (Service Quality; Mobilisation & TUPE)

NOTE FOR THE CLIENT, NOT PART OF THE TEXT TO BE SUBMITTED
What the Trust assesses: TUPE plan, continuity, staffing risks, induction and training, culinary development, staffing levels, management structure, wellbeing and retention (spec. 8 and 16.2).

TUPE. Collective information meetings at each school within 10 working days of award, followed by individual meetings with every transferring employee; consultation with recognised trade unions and elected representatives; no measures envisaged that change terms and conditions. Pension continuity through an admission agreement with the relevant LGPS fund, started on the day of award.

Training. In the first month: food hygiene Level 2 (Level 3 for head cooks), allergen awareness, safeguarding, customer service. Every year: refresher training and a culinary skills day for each cook. Every employee has a yearly development review.

Staffing commitment	Measure
Enhanced DBS with barred list check before starting in a school	100% of school-based staff
Mandatory training completed	100% within 4 weeks of transfer or start
Staff retention	at least 85% of the catering workforce retained at the end of year 1; turnover reported every quarter by school
Wellbeing	employee assistance programme and a named line manager for every employee

8. Sustainability

NOTE FOR THE CLIENT, NOT PART OF THE TEXT TO BE SUBMITTED
What the Trust assesses: practical and measurable actions on food miles and sourcing, carbon, food waste and packaging, with targets and reporting (spec. 9 and 16.4).

Area	Action	Target and reporting
Food miles and sourcing	Meat, milk, eggs and seasonal vegetables from suppliers in Devon and Cornwall; menus written around the season	at least 40% of food purchases from Devon and Cornwall by year 2; reported each term
Food waste	Weekly weighing of plate and preparation waste in each kitchen; forecasting from daily orders; surplus donation where safe and permitted	-20% waste per meal by the end of year 2 against the first-term baseline
Packaging	No single-use plastic cutlery or cups; bulk ordering of dry goods	zero single-use plastic cutlery from day one
Carbon	Low-carbon recipes on meat-free days; delivery rounds combined by cluster	delivery vehicle visits per school per week reported each term

Purchasing follows the Government Buying Standards for Food and Catering Services where relevant and proportionate.

9. Social value

NOTE FOR THE CLIENT, NOT PART OF THE TEXT TO BE SUBMITTED
What the Trust assesses: local employment, apprenticeships, community engagement, educational activities, with commitments and outcomes (spec. 9 and 16.3).

Commitment	Measure over the initial term
Vacancies advertised locally first (school newsletters, local job centres)	at least 80% of new hires living within 10 miles of the school
Apprenticeships (professional cookery or hospitality)	2 new apprentices each year, 6 in total
Cooking clubs and curriculum sessions led by our chefs	1 session per school per term
Community engagement (family cooking evenings, holiday activities support)	40 volunteering hours per year

11. Technology and reporting (Innovation & Added Value)

Online menus with allergen filters for parents; monthly management information pack agreed with the Trust (meals by category, income, costs, variances, complaints, incidents, KPIs), reconciled with invoices; personal data processed under UK GDPR and the Data Protection Act 2018, with role-based access.

12. Mobilisation (Mobilisation & TUPE)

Week from award	Activity
1-2	Mobilisation board with the Trust; plan and risk log agreed; TUPE information meetings; kitchen and equipment surveys
2-5	Consultation and individual meetings; LGPS admission process; supplier accounts set up; food business registration of each kitchen with the local authority
4-6	Parent and carer communications: introduction letter and menu launch in week 4, tasting event at each school in weeks 5-6, FAQ on the school websites; training of transferring staff
6-7	Test of ordering, invoicing and reporting; readiness review and go-live sign-off with the Trust
1 April 2027	Service starts; daily support visits by the area managers in the first two weeks

13 and 14. Contract management and innovation

KPIs reported monthly from the first month on the performance areas of section 13 of the specification; a continuous improvement plan reviewed every six months; one new proposal a year (for example a breakfast offer or a salad bar trial in one school) agreed with the Trust before roll-out.

Exeter, date of signature
Authorised signatory: Name Surname (placeholder), Managing Director, for and on behalf of Example Services Ltd
To be signed by the authorised signatory (electronic signature or signed PDF). The authorised signatory reviews the document before signing it and takes responsibility for it.

DOCUMENT 04 OF THE TRUST, ALL FIVE SHEETS · ALL VALUES IN GBP, VAT SHOWN SEPARATELY

6. Pricing Schedule (commercial proposal)

Contracting authority: Connect Academy Trust (Companies House 10192252) · **Reference:** CONNECT2026-1 · **Notice:** 2026/S 000-096984 (edited as 2026/S 000-104533) · **OCID:** ocds-h6vhtk-078782
Subject: Catering Services: school catering services across nine schools of Connect Academy Trust in Plymouth, Torquay and Newton Abbot (reference CONNECT2026-1)

NOTE FOR THE CLIENT, NOT PART OF THE TEXT TO BE SUBMITTED
ESTIMATE: suggested figures, to be checked and decided by the authorised signatory. Unit costs and charges are decided by the company; these are example values.

Sheet "School Pricing" (annual, excluding VAT unless stated)

School	Annual meals	Food £/meal	Labour £/meal	Other £/meal	Cost £/meal	Mgmt charge £/year	Hospitality £/year	Total excl. VAT (£)	VAT 20% (£)	Total incl. VAT (£)
Cockington	39,230	1.30	1.18	0.12	2.60	3,600.00	900.00	106,498.00	21,299.60	127,797.60
Eden Park	25,724	1.30	1.26	0.12	2.68	3,600.00	900.00	73,440.32	14,688.06	88,128.38
Eggbuckland Vale	36,782	1.30	1.18	0.12	2.60	3,600.00	900.00	100,133.20	20,026.64	120,159.84
Leigham	36,953	1.30	1.18	0.12	2.60	3,600.00	2,400.00	102,077.80	20,415.56	122,493.36
Manadon Vale	36,800	1.30	1.18	0.12	2.60	3,600.00	900.00	100,180.00	20,036.00	120,216.00
Preston	37,197	1.30	1.18	0.12	2.60	3,600.00	900.00	101,212.20	20,242.44	121,454.64
Thornbury	37,956	1.30	1.18	0.12	2.60	3,600.00	900.00	103,185.60	20,637.12	123,822.72
Widey Court	39,494	1.30	1.18	0.12	2.60	3,600.00	900.00	107,184.40	21,436.88	128,621.28
Haytor View	19,950	1.30	1.34	0.12	2.76	3,600.00	900.00	59,562.00	11,912.40	71,474.40
Total	**310,086**					**32,400.00**	**9,600.00**	**853,473.52**	**170,694.70**	**1,024,168.22**

"Annual meals" is the Trust baseline, also used as the supplier assumption; "Annual fixed costs": £0.00 (included in the management charge). Total per school = meals × cost per meal (food + labour + other) + management charge + hospitality.

Sheet "Other Charges"

Cost / item	Unit price excl. VAT (£)	Annual quantity	Annual total excl. VAT (£)	Mandatory / optional
One-off mobilisation charge	7,500.00	1 (year 1 only)	7,500.00	Mandatory
TUPE / pension-related cost assumptions	0.00	not applicable	0.00	Included in labour cost (assumption 3)
Equipment / smallwares	300.00 per school	9	2,700.00	Mandatory
Repairs and maintenance	0.00	not applicable	0.00	Trust responsibility (assumption 5)
Hospitality / ad hoc events	0.00	not applicable	0.00	Included in "School Pricing"
Technology / meal ordering / reporting	1,800.00	1	1,800.00	Mandatory

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Cost / item	Unit price excl. VAT (£)	Annual quantity	Annual total excl. VAT (£)	Mandatory / optional
Training and compliance	0.00	not applicable	0.00	Included in labour cost

Summary

Item	Excl. VAT (£)	VAT 20% (£)	Incl. VAT (£)
Recurring annual cost (853,473.52 + 2,700.00 + 1,800.00)	857,973.52	171,594.70	1,029,568.22
Year 1 including mobilisation (857,973.52 + 7,500.00)	865,473.52	173,094.70	1,038,568.22
Initial term of 3 years (857,973.52 × 3 + 7,500.00)	2,581,420.56	516,284.11	3,097,704.67
5 years with both extensions (857,973.52 × 5 + 7,500.00)	4,297,367.60	859,473.52	5,156,841.12

Sheet "Assumptions" (extract)

No.	Assumption / exclusion / dependency	Financial impact (£)
1	Meal volumes as the Trust baseline; 190 service days a year.	nil (priced on baseline)
2	Prices fixed for the first 12 months; then yearly review indexed to the CPI food and non-alcoholic beverages index and to the National Living Wage, capped at 5% a year.	nil in year 1
3	Labour costs assume transfer of the current staff on current terms, with LGPS employer contributions at the rate certified by the fund actuary for the admission agreement; any difference from the rate assumed in the labour cost treated as a pass-through, subject to agreement with the Trust. To be confirmed when the TUPE information is issued.	not quantifiable until TUPE information is issued
4	Utilities, kitchen premises and large equipment provided by the Trust at no charge.	nil
5	Repairs and replacement of large kitchen equipment remain with the Trust.	nil
6	VAT at the standard rate on supplies to the Trust.	VAT shown separately
7	Leigham hospitality includes Trust-level meetings held at the Trust's registered office.	1,500.00 a year above the other schools

Commercial arrangement description: fixed price per meal by school plus an annual management charge, invoiced monthly on actual meal numbers reconciled with school registers; meal income collected by the schools and retained by the Trust. **Indexation / price review proposal:** see assumption 2.

Supplier confirmation: all costs needed to meet the specification are included except the items stated above.

Sheet "TUPE - Labour Schedule": not applicable until the employee liability information is issued; labour costs per assumption 3.

Supplier certification (sheet "Supplier Instructions"): We confirm this schedule is complete and consistent with our tender response. Name Surname (placeholder), Managing Director, date of signature.

NOTE FOR THE CLIENT, NOT PART OF THE TEXT TO BE SUBMITTED

How the estimate was built. Choose the invoicing basis: the documents do not say whether invoices follow actual meals or the baseline volume, nor who collects paid meal income ("management fee" arrangement in cell B6 of "Supplier Instructions"); the text above assumes actual meals and income kept by the Trust. The Trust has not published the commercial scoring formula (ITT section 7 says it must be published before tenders are received), so a points simulation is not possible. The cost per meal (£2.60 to £2.76) is below the paid pupil prices in the Trust's table (£2.80 to £2.95) and the annual total (£857,973.52) is in line with the £850,000 "current value" of the notice. Labour (on average 46% of the meal cost) is the most uncertain item until the TUPE information arrives: check it before submitting. VAT: confirm the VAT treatment with your adviser; academies can normally recover VAT on these services.

7. Tender security, signing and submission checklist

Contracting authority: Connect Academy Trust (Companies House 10192252) · **Reference:** CONNECT2026-1 · **Notice:** 2026/S 000-096984 (edited as 2026/S 000-104533) · **OCID:** ocds-h6vhtk-078782
Subject: Catering Services: school catering services across nine schools of Connect Academy Trust in Plymouth, Torquay and Newton Abbot (reference CONNECT2026-1)

Read every declaration and company detail again before signing.

Tender security

The tender documents do not require a bid bond, guarantee or deposit. Any performance security or parent company guarantee would be in the draft contract, which has not been published (see document 9).

Signatures

Document	Signatory	Method
PSQ (Part 4), form of tender, Appendix E, conflict of interest and confidentiality statements, quality response	Authorised signatory	Signed PDF or electronic signature
Pricing Schedule (Excel) with certification	Authorised signatory	Name, role and date after the certification text in row 11, and supplier legal name and procurement reference in rows 3 and 4 of "Supplier Instructions"; Excel file not converted to PDF

Return checklist (ITT section 11 and Appendix C of the specification)

✓	Item	File
☐	Completed PSQ and confirmation that core supplier information is shared on the Central Digital Platform	02_PSQ_ExampleServices.pdf
☐	Quality response against all headings	Quality_Response.pdf
☐	Completed Pricing Schedule and assumptions	04_Pricing_Schedule.xlsx
☐	TUPE response and mobilisation plan (sections 7 and 12 of the response, TUPE acknowledgement)	in Quality_Response.pdf and Declarations.pdf
☐	Social value plan and sustainability plan (sections 8 and 9)	in Quality_Response.pdf
☐	Insurance certificates, policies and evidence requested	Insurance_and_Policies.pdf
☐	References and permissions for verification	in 02_PSQ (3C.1)
☐	Subcontractor list and associated-person information	in 02_PSQ (2A, 2B)
☐	Signed tender, Appendix E and conflict declarations	Declarations.pdf

Submission by email

1. Check on the Central Digital Platform that the core supplier information has been shared with the Trust, then send all files in one email to the submission address in the tender notice, subject line "CONNECT2026-1 Catering Services: tender of Example Services Ltd".
2. Deadline: **11:59pm on 23 November 2026** (UK time). Send by the afternoon to leave time for any delivery problem; keep attachments below 20 MB, or split them into numbered emails.
3. Ask for and keep the acknowledgement of receipt; keep a copy of the sent email.

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8. Documents the client must obtain

Contracting authority: Connect Academy Trust (Companies House 10192252) · **Reference:** CONNECT2026-1 · **Notice:** 2026/S 000-096984 (edited as 2026/S 000-104533) · **OCID:** ocds-h6vhtk-078782
Subject: Catering Services: school catering services across nine schools of Connect Academy Trust in Plymouth, Torquay and Newton Abbot (reference CONNECT2026-1)

These documents are obtained by the company itself, from its records or from third parties. For each: where to get it and when it is needed.

Document	Where and how	When
Central Digital Platform registration and sharing	Account on Find a Tender; complete basic, financial, connected person and exclusion information; share it with Connect Academy Trust	Before the deadline (allow a few days)
Accounts for 2023, 2024 and 2025	Company records or Companies House filings; uploaded to the platform	Before the deadline
Cash flow forecast and budget assumptions	Finance team, for the contract term (PSQ 3A.2)	Before the deadline
Insurance certificates	Insurance broker: employer's, public and product liability, with expiry dates	Before the deadline
Referee permissions	The three clients of PSQ 3C.1, by email	Before the deadline
Policies: safeguarding, health and safety, food safety (HACCP), allergens, data protection, equality, modern slavery statement	Company records, signed and dated in the last 12 months	With the tender
Food hygiene ratings and audit reports of current sites	Food Standards Agency ratings website; latest independent audits	With the tender
ICO registration	Information Commissioner's Office register	With the tender
Employee liability information (TUPE)	From the Trust (TUPE schedule not yet issued); legally due from the transferor at least 28 days before transfer	Before pricing is final and before award
LGPS admission agreement	Relevant LGPS fund and actuary, through the Trust	From award to 1 April 2027
Enhanced DBS checks with barred list	For every school-based employee, through a registered umbrella body	Before each person starts in a school
Food business registration of each kitchen	Local authority (Plymouth, Torbay, Teignbridge), at least 28 days before starting	During mobilisation

9. Note on the checks carried out

Contracting authority: Connect Academy Trust (Companies House 10192252) · **Reference:** CONNECT2026-1 · **Notice:** 2026/S 000-096984 (edited as 2026/S 000-104533) · **OCID:** ocds-h6vhtk-078782
Subject: Catering Services: school catering services across nine schools of Connect Academy Trust in Plymouth, Torquay and Newton Abbot (reference CONNECT2026-1)

Every turnkey tender goes through two checks before delivery: one on the rules of the tender documents and one on the consistency between documents and responses. Outcome for this example:

First check: rules of the tender documents

Check	Outcome
Reference, notice identifier and subject identical in all documents and to the notice	**Passed**
Deadline, time and method: 11:59pm on 23 November 2026, by email, as in the edited notice	**Passed**
Quality response covers all award criteria and the headings of section 17 of the specification; notes for the client kept outside the text to submit	**Passed**
No price or cost in the PSQ or in the quality response (social value expressed in hours and people, not in pounds)	**Passed**
Pricing Schedule: totals by school, VAT at 20%, annual, 3-year and 5-year totals recalculated	**Passed**
Every item of the ITT return checklist and of Appendix C matched to a file	**Passed**
Signatures and certification shown for every file	**Passed**

Second check: consistency between documents and responses

- **Corrected:** the ITT (section 5) still gives 16 November 2026 as the deadline; the notice was edited on 4 November to 23 November. The documents use 23 November, in line with section 15 of the specification (the timetable in the Tender Notice prevails).
- **Flagged:** procedure. The notice says "Below threshold - open competition"; the specification and the ITT describe a two-stage Competitive Flexible Procedure with a PSQ stage. The tender therefore includes PSQ and full tender together. With the tender open, a clarification would be asked before 16 November.
- **Flagged:** estimated value. £850,000 is described as the "current value of contract"; the meal volumes of the Pricing Schedule (310,086 a year) confirm it is an annual figure. Under Schedule 3 to the Act the estimate is the maximum amount payable including extensions, and amounts include VAT (section 123(2)): about £5.2m including VAT (£4.3m excluding VAT) over 5 years, well above the light touch threshold of £663,540 (Schedule 1 to the Act, row 8). If below threshold, Part 6 of the Act would not even apply, because an academy trust is a "school" for section 84(2)(a). This affects the Trust's duties (assessment summaries and contract award notice under section 50; standstill is voluntary for light touch contracts under section 51(3)(f)), not the content of the tender.
- **Flagged:** the TUPE schedule (document 03) and the draft contract were not published; the labour cost and the contract terms (KPIs, service credits, security) could not be checked. Labour is priced on stated assumptions.
- **Flagged:** the scoring scale and the commercial formula were not published, although ITT section 7 and section 23(3)(a) of the Act require the assessment methodology to be set out. It is also unclear how presentations and food tasting fit within the weightings.
- **Flagged:** PSQ 1.2 allows sharing of the platform information by 14 December 2026, after the tender deadline. The information is shared before the deadline anyway.

- **Flagged:** the notice states "Tenders may be submitted electronically: No" but gives an email address; the ITT speaks of a portal. The tender is sent by email, with acknowledgement of receipt.
- **Corrected:** Appendix A of the specification places Eden Park and Preston in Plymouth, while section 1 places them in Torquay and Appendix A itself describes them as Torbay schools; the response uses Torquay (Torbay cluster).
- **Flagged:** ITT and PSQ are marked "working draft" with square-bracketed fields still to complete; the tender documents prepared here rely only on the published text.

Questions put to the client before delivery (example answers)

1. Employees, turnover and SME status? *140 employees, £6.2m, SME.*
2. Three comparable contracts in the last 3 years, with referees? *Clients A, B and C (PSQ 3C.1).*
3. Will you subcontract any part? *Only kitchen extract cleaning, if within our responsibilities.*
4. Which information is commercially sensitive? *Unit costs and relief staffing arrangements (document 4).*
5. Cost per meal, management charge and mobilisation charge? *Values in document 6.*
6. Insurance levels and expiry dates? *Employer's £10m, public and product £5m.*

This is a demonstration document. The tender is real and the deadline has passed; Example Services Ltd is a fictitious company; data, signatures and prices are placeholders or examples. The document has not been submitted and is not a tender. Unicorn Contracts, your online bid office: contracts.unicornprivate.com

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