

**Tender for retail catering at Worthing and St Richard’s Hospitals, Sussex**

**on behalf of**

**University Hospitals Sussex NHS Foundation Trust**

**Evaluation Framework**

Reference: C212869

**Overview**

The evaluation process will be based the published criteria, with independent evaluation by an evaluation team, followed by moderation to shortlisting. The stages of the evaluation will be as follows:

Round one - compliance check of all bids received by the closing date and time; noncompliant bids rejected.

Round two - independent evaluation of the technical elements of proposals

Round three - Financial Appraisal

Round four - Final moderation and notification of outcomes for each Lot.

Bidder feedback will be given at the conclusion of the evaluation process.

**Round One: Compliance Check**

* A compliance check will be undertaken on all bids received by the closing date.This will include a review of the pass/fail criteria as follows:

**Pass / Fail Criteria:**

* 5\* EHO rating
* Required legislative food safety and health and safety requirements.
* Public and Employee Liability Insurance of £5m and Professional Indemnity Insurance of £2m
* Confirmation that staff are paid Living Wage and that operators can demonstrate ethical supply chain practices including Modern Slavery principles.
* Financial standing criteria will also be reviewed at this stage.

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| **Category** | **Category Weighting** | **Element** | **Detail** | **Element Weighting** | **Calculated using** |
| Financial Standing  | Pass/Fail  | Supplier turnover vs contract limit | Contract value no more than 50% of annual turnover | Pass/Fail  | Annual Accounts |
| Financial Ratios  |  Liquidity ratio test (greater than or equal to 1.0) | Pass/Fail  | Annual Accounts |
| Gearing Ratio (less than or equal to 67%) | Pass/Fail  | Annual Accounts |

* Any non-compliant bids or bids where the pass/fail criteria are not met will be rejected.

**Round Two: Technical Evaluation**

* The technical evaluation will account for 70% of the final score for the tender. The remaining 30% will be assigned to the financial evaluation (see Round 3).

**Part A) Independent Evaluation of Tender Submission**

* Potential operators will submit their response to the ITT using the technical response template.
* The technical response document includes 8 criteria against which bids will be evaluated.
* Each criterion will be scored between 0-5 as set out in the table 1. The evaluation will be undertaken independently by an evaluation team who will comprise stakeholders from within the Trust.
* The technical response criteria are weighted and then the total score scaled to give a maximum score of 70% for this section as set out in table 2.

**Table 1: Scoring Matrix Table**

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| **Scoring Matrix Table**  |
| **Score** | **Classification** | **Definition** |
| 0 | No response (complete non-compliance) | No response at all or insufficient information provided in the response such that the solution is totally un-assessable and/or incomprehensible. |
| 1 | Unsatisfactory response (potential for some compliance but very major areas of weakness) | Substantially unacceptable submission which fails in several significant areas to set out a solution that addresses and meets the requirements: little or no detail may (and, where evidence is required or necessary, no evidence) has been provided to support and demonstrate that the Tenderer will be able to provide the services and/or considerable reservations as to the Tenderer’s proposals in respect of relevant ability, understanding, expertise, skills and/or resources to deliver the requirements of the Service Specification. Would represent a very high-risk solution for the Trust. |
| 2 | Partially acceptable response (one or more areas of major weakness) | Weak submission which does not fully address the stated requirement: response may be basic/ minimal with little or no detail (and, where evidence is required or necessary, with insufficient evidence) provided to support the submission and demonstrate that the Bidder has the required capability and capacity to be able to deliver the requirements of the Service Specification and may represent a high-risk solution for the Trust. |
| 3 | Satisfactory and acceptable response (substantial compliance with no major concerns) | Submission largely addresses and meets the requirements, with some detail (or, where evidence is required or necessary, some relevant evidence) provided to support the submission. There is however some minor reservations or weaknesses in the submission which may represent a Medium, acceptable risk solution to the Trust. |
| 4 | Fully satisfactory / very good response (fully compliant with requirements). | Submission sets out a comprehensive and robust response that addresses and meets all requirements, with strong evidence provided to support the submission; provides full confidence as to the Tenderer’s capability, expertise, and capacity to deliver the requirements of the Service Specification. Low/No Risk solution for the Trust. |
| 5 | Excellent | The submission excels in meeting the criteria, meets and exceeds the requirements as per the specification (with supporting evidence where necessary). No risk for the Trust.  |

**Table 2: Technical Response Scoring Methodology**

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| **#** | **Criteria** | **Description** | **Max Score** | **Weighting** | **Maximum Weighted Score** |
| 1. | Service Proposal | Provide full details of your service delivery proposal including providing details on the systems and processes that your organisation will use. | 5 | 10 | 50 |
| 2. | Service Management and Supervision | Provide details for the proposed management of the service. | 5 | 5 | 25 |
| 3. | Capability and Experience | Detail your capability and experience in respect of your ability to achieve the required specification  | 5 | 6 | 30 |
| 4. | Social Value | Detail how your proposal will enhance Social Value within the local area. | 5 | 10 | 50 |
| 5. | Quality Assurance | Detail the measures you will have in place to assure the quality of your services | 5 | 6 | 30 |
| 6. | Environmental Management and Sustainability | Detail the Environmental Management measures you have in place and how your environmental practices will support the Trust to deliver the ambitions within its Green Plan | 5 | 10 | 50 |
| 7. | Example Menus and Tariff | Detail example menus and tariff you are proposing | 5 | 10 | 50 |
| 8. | Mobilisation | Detail your mobilisation procedures and experience. | 5 | 6 | 30 |
|  |  | Maximum available score  |  |  | 315 |

**Part B: Moderation and Shortlisting**

* Scores from part a will be moderated to agree a single score for each bidder against each criterion.
* Any potential operators who do not meet the following criteria will not proceed further in the process and will be eliminated:
	+ No more than two individual criteria scores of 0 or 1
	+ A minimum score of 189.
* For each lot, the four bidders with the highest technical score will be invited to present further details of their bid to a panel of Trust stakeholders. If there are less than four bidders all bidders will be invited to present.
* Where a single bidder meets the criteria to be invited to interview for multiple lots, they will attend a single interview and their score from that interview will be applied to their submission for each lot.
* Bidders will be notified if they are shortlisted for round three and will be given at least one week’s notice of the presentation date.

**Part C: Supplier Interviews and Presentation**

* Bidders will present and be asked questions by a stakeholder panel from the Trust. The topic areas and scoring as follows:

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| **#** | **Topic** | **Max Score** | **Weighting** | **Maximum Weighted Score** |
| A | Please talk us to us about your proposed menus, how they have been developed to meet the meets of a busy hospital setting and how you propose to keep costs down for staff and customers. **Please bring a minimum of 5 examples (no more than 10) of your product range across hot and cold offers that demonstrate the variety and quality that we can expect to see sold in your unit. Please note there is no access to a kitchen.** | 5 | 10 | 50 |
| B | How would you engage with the Trust team during fit-out and mobilisation in order to ensure that the timelines for re-opening the units can be met? | 5 | 10 | 50 |
| C | Our Retail Catering Strategy is underpinned by three core principles, as set out in the specification document:• Environmental Sustainability: • Staff Health and Wellbeing: • Corporate Social Responsibility: Can you tell us more about how you will specifically work with us as a partner to support these principles | 5 | 8 | 40 |
| D | How will you respond to the ongoing and changing needs of staff over the course of the contract, for example, how will you listen to their feedback about prices, quality of menus/products on sale, affordability? | 5 | 7 | 35 |
|  | Maximum available score |  |  | 175 |

* The interview score will be moderated to give a single score for each supplier. This will be added to the score from part B and then scaled (supplier score divided by seven(7)) to give a total score out of 70 for the technical evaluation.

**Round Three: Financial Appraisal**

* The financial appraisal will account for 30% of the total score available.
* Bidders should complete all 4 sections of the Commercial Schedule which contains full instructions on completion.
* The Standard differential model will be used for scoring. The bidder with the highest value will receive 100% of the score. Other bidder with percentage of the score relative to this. Your value / highest value x weighting. Total score for each section are added together to arrive at the final mark out of 30%.

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| **Category** | **Category Weighting** | **Element** | **Detail** | **Element Weighting** |
| Price  | 30 | Rental (Guaranteed) | Year 1 | 5 |
| Total over initial 5-year contract period | 10 |
| Guaranteed rental indexed against RPI | 5 |
| Rental (Revenue Share) | Total value of revenue share over initial 5-year contract period | 10 |

**Round 4: Final Score**

* The scores from round two (technical evaluation) and round three (financial appraisal) will be combined to give a total score for each bidder.

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| Element | Weighting |
| Technical Evaluation (Round Two) | 70% |
| Financial Appraisal (Round Three) | 30% |