



Department of Health

INVITATION TO TENDER FOR THE PROVISION OF:
INFECTED BLOOD SCHEME ADMINISTRATION SERVICES
(DRAFT VERSION ONLY FOR ILLUSTRATION)

Deadline: 12:00 NOON 9 DECEMBER 2016
ITT Reference: [insert ITT reference number]

PART A – Instructions

INTRODUCTION: Invitation to Tender

The Secretary of State for Health is issuing this Invitation to Tender ("ITT") in connection with a competitive procurement conducted in accordance with the Open Procedure under the **Public Contract Regulations 2015** (as amended). Tenderers are invited to provide proposals for Infect Blood Scheme Administration Services as advertised in the Official Journal of the European Union (OJEU) **[DN: INSERT DETAILS OF THE CONTRACT NOTICE]**. This document contains the materials the Department of Health ("the Authority") will use to form the basis of any contract that may be awarded.

This Invitation to Tender document consists of:

Part A

Introduction to Invitation to Tender;

Section One: Instructions to Tenderers;
Section Two: Conditions of Contract; and
Section Three: Evaluation Methodology and Criteria.

Part B

Schedule One: Specification;
Schedule One (a): Tenderer Response;
Schedule Two: Pricing Schedule;
Schedule Three: Contract Monitoring
Schedule Four: Confidential & Commercially Sensitive Information;
Schedule Five: Administrative Instructions;
Schedule Six: Form of Tender;
Appendix A: Sub-Contractors; and
Appendix B: Parent Company Guarantee.

The Authority is using its electronic tendering portal, the Business Management System ("BMS") to carry out the tender process. If you need any assistance using the BMS system please contact the helpdesk on 0113 254 5777 between 10:00hrs and 16:00hrs.

If there is an intention to tender, then the potential Tenderer should acknowledge their interest (as quickly as possible) by sending a message through BMS (online messages). This is the sole responsibility of the Tenderer and ensures that future updates etc. can be provided in an effective and timely manner. Failure to acknowledge your intention in this manner may lead to delays in receiving additional information and clarification updates.

Any questions regarding this ITT must be sent to the Authority using BMS (online messages). All questions must be received by the deadline for questions **[2 December 2016]**. The Authority will copy all non-commercially sensitive answers to questions to all Tenderers (that have acknowledged an interest in tendering) via BMS and not respond to questions received after the deadline.

As part of the tender response, Tenderers must complete all relevant sections in Part B of the tender pack. All tenders must be returned no later than the deadline for receipt of tenders **[DN: insert date and time]** and must be submitted via BMS. Late tenders shall not be accepted.

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(Part A – Instructions)

IMPORTANT NOTE

Tenders may only be uploaded via the Sourcing Home Page, using the 'Actions' window and selecting the 'Create Tender' option.

If you upload your Tender by any other method for example by using the 'New Message/ Documents' tab, the Tender will not be correctly linked to the ITT and your submission will be rejected.

SECTION ONE: Instructions to Tenderers

1. TENDER DOCUMENTS AND THE TENDERERS RESPONSIBILITIES

1.1 Tenders shall be submitted in accordance with the following instructions. It is important that all the information requested is provided in the format and order specified. If the Tenderer does not provide all of the information the Authority has requested within the tender pack, the Authority may reject the tender as non-compliant.

1.2 The Tenderer is expected to examine, and where necessary respond to, all of the documents that comprise the tender documents. Tenderers should acquaint themselves fully with the extent and nature of the requirement and the contractual obligations.

1.3 Tenderers must obtain for themselves, at their own responsibility and expense, all information necessary for the preparation of their tender. Tenderers are solely responsible for any costs and expenses in connection with the preparation and submission of their Tender, and all other stages of the selection and evaluation process. Under no circumstances will the Authority, or its advisers, be liable for any costs or expenses Tenderers, their sub-contractors, suppliers or advisers incur in this process.

1.4 Tenderers are solely responsible for obtaining the information that they consider is necessary in order to prepare the content of their tender and to undertake any investigations they consider necessary in order to verify any information the Authority provides during the procurement process.

1.5 All pages of the tender submission must be sequentially numbered (including any forms to be completed and returned).

1.6 All specifications, plans, drawings, samples and patterns and anything else that the Authority issues in connection with this ITT, remains the property of the Crown and are to be used solely for the purpose of tendering.

1.7 All Tenderers must submit their tender responses in machine-readable format (preferably non-pdf).

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2. THE AUTHORITY'S RIGHT TO AMEND OR TERMINATE THE TENDERING PROCESS

2.1 At any time prior to the deadline for receipt of questions, (that is a minimum of 4 days before the deadline for receipt of Tenders) the Authority may modify the tender documents by amendments in writing.

2.2 The Authority (at its sole discretion) may extend the deadline for receipt of Tenders.

2.3 The Authority reserves the right to modify or to discontinue the whole of, or any part of, this tendering process at any time and accepts no obligation whatsoever to award a contract.

3. TIMETABLE

3.1 The timetable for this procurement is set out in Table 1Table 4. This is intended as a guide and whilst the Authority does not intend to depart from the timetable, it reserves the right to do so at any stage.

3.2 Not Used.

3.3 The Authority has set aside dates for accommodating potential Tenderer Clarification Meetings (see 9 for details).

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Table 1: Indicative timetable

KEY ACTIONS	DATES
Invitation to Tender document issued	1 November 2016
End of clarification question period*	2 December 2016
Tender return date and time	9 December 2016
Tenderer Clarification Meetings [DN: delete this row if not required]	[INSERT DATE AND TIMES]
Notification to unsuccessful and preferred Tenderers	31 January 2017
End of standstill period	10 February 2017
Contract work starts	[INSERT DATE AND TIMES]

4. FORM OF TENDER

- 4.1 Part B, Schedule Six (Form of Tender) must be returned with your tender submission.
- 4.2 The contractual form will be a combination of the following
 - Part A, Section Two: Conditions of Contract; and
 - Part B: all applicable Schedules and Appendices.

5. TENDER INFORMATION

- 5.1 The Authority acts in good faith at all times. However, Tenderers must satisfy themselves as to the accuracy of information the Authority provides. The Authority accepts no liability for any loss or damage of whatever kind or howsoever caused arising from Tenderers use of such information, unless such information has been supplied fraudulently by the Authority (where the meaning of fraudulently is "the making of false representation knowingly, or without belief in its truth, or recklessly").
- 5.2 This invitation and its accompanying documents shall remain the property of the Authority and must be returned on demand.

6. CROSS GOVERNMENT REPORTING

- 6.1 All Central Government Departments and their Executive Agencies and Non Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement – including ensuring value for money and related aspects of good procurement practice.
- 6.2 For these purposes, the Authority may disclose within Government any of the Tenderer's documentation/information (including any that the Contractor considers to be confidential and/or commercially sensitive such as specific bid information) submitted by the Tenderer to the Authority during this procurement. The information

Open Tender Pack (Part A – Instructions)

will not be disclosed outside Government. Tenderers taking part in this competition consent to these terms as part of the competition process

7. FREEDOM OF INFORMATION ACT 2000

- 7.1 As a Government Department, the Authority is subject to, and must comply, with the, Freedom of Information Act 2000 ("FOIA").
- 7.2 In accordance with the obligations and duties placed upon public authorities by the FOIA and the Environmental Information Regulations 2004 ("EIR") the Authority may be required to disclose information submitted by the Tenderer.
- 7.3 In respect of any information submitted by a Tenderer that it considers to be commercially sensitive the Tenderer should:
 - 7.3.1 clearly identify such information as commercially sensitive;
 - 7.3.2 explain its reasons why disclosure of such information would be likely to prejudice or would cause actual prejudice to its commercial interests; and
 - 7.3.3 provide a reasoned estimate of the period of time during which the Tenderer believes that such information will remain commercially sensitive.
- 7.4 This information must be listed in Schedule Four, shown as either Confidential Information or Commercially Sensitive Information (please see the Conditions of Contract for definitions).
- 7.5 Where a Tenderer identifies information as commercially sensitive, the Authority will take those views into account. Tenderers should note, however, that, even where information is identified as commercially sensitive, the Authority may require disclosure of such information in accordance with the FOIA or the EIR. It is the sole responsibility of the Authority to decide whether the information might be exempt from disclosure under the FOIA or the EIR and whether the public interest favours disclosure or not. Accordingly, the Authority cannot guarantee that any information marked 'confidential' or "commercially sensitive" will not be disclosed.
- 7.6 Where a Tenderer receives a request for information under the FOIA or the EIR connected to this procurement process, the Authority requires the Tenderer to consult with it to establish if the request is for the Authority.

8. SUBMISSION OF TENDERS

- 8.1 Tenderers must submit tender responses using BMS. Tenderers must ensure that they leave plenty of time to upload the tender response, particularly where there are large documents. If Tenderers have any problems with BMS, they must contact the helpdesk on 0113 254 5777 prior to the return time.
- 8.2 The helpdesk is open Monday to Friday between 10am and 4pm excluding public and bank holidays. It is important to note that the Authority **is not obliged to accept** any tender that is submitted after the deadline for the receipt of tenders has passed.
- 8.3 Tenderers must submit a single copy of their tender submission.
- 8.4 Tenderers are requested not to provide any extraneous information that has not been specifically requested in the ITT including, for example, sales literature or Tenderers' standard terms and conditions etc.
- 8.5 **Tenderers shall note that any contract awarded under this procurement shall be on the Authority's terms and conditions of contract.**
- 8.6 The Authority reserves the right to reject any tender if the Tenderer has failed to complete and return parts of the Form of Tender; or fails to provide the information

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requested in this Invitation to Tender; or the Tenderer has submitted any modification; or the Tenderer has submitted any qualifications to their tender.

9. MODIFICATION AND WITHDRAWAL OF TENDERS

- 9.1 The Tenderer may modify the tender prior to the deadline for receipt of tenders. Any Tenderer wishing to submit a new tender using BMS should contact the BMS helpdesk to advise that a replacement tender is being submitted. It is the Tenderer's responsibility to contact the BMS helpdesk to resolve any problems with the electronic submission of the Tender.
- 9.2 No tender may be modified after the deadline for receipt of tenders.
- 9.3 Tenders may be withdrawn at any time before the deadline for receipt of tenders. New tenders may be submitted up until the deadline for receipt of tenders, providing such intention is notified to the Authority using BMS or in writing when BMS cannot be used.
- 9.4 The Tenderer may withdraw a tender after the deadline for receipt of tenders, providing such intention is notified to the Authority using BMS or in writing when BMS cannot be used.

10. TENDER QUALIFICATIONS

- 10.1 Tenders must not contain any proposed changes (or 'qualifications') to the Conditions of Contract. Tenders must be submitted strictly in accordance with the tender documentation. Tenders must not be accompanied by statements that could be construed as rendering the tender equivocal and/or placing it on a different footing from other tenders.
- 10.2 Only tenders submitted without qualification, strictly in accordance with the tender documentation as issued (or subsequently amended by the Authority) will be accepted for consideration. The Authority's decision on whether or not a tender is acceptable will be final and the Tenderer concerned will not be consulted. **Qualified tenders will be excluded from further consideration**

11. NOTIFICATION OF AWARD OF CONTRACT

- 11.1 There will be a 10 calendar days Standstill Period between communicating the contract award decision and the conclusion of the contract award. This is a requirement under the Public Contracts Regulations 2015 (as amended).
- 11.2 Tenderers should note that the Authority will publish a contract award notice (including the name and address of the successful Tenderer(s) in the Official Journal of the European Union and notify the same details to unsuccessful Tenderers). Acceptance of the contract in these circumstances is deemed to be formal authorisation to publish these details.

12. PRICE

- 12.1 The Authority is always looking for solutions that are both sustainable and offer value for money. Tenderers are encouraged to offer discounts, efficiencies and sustainable solutions within their tender response. This should not be construed as an invitation to negotiate and the Authority will base its award decision solely on definitive terms.

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- 12.2 All prices submitted must be quoted in pounds sterling with the price firm for the duration of the Contract and not be subject to any variation unless provided for in the Conditions of Contract.
- 12.3 The basis of the price should include all the costs for the provision of the services in accordance with the Authority's requirements.
- 12.4 When uploading tenders, there is a requirement to enter a price on the BMS screen. When asked for a total price for the whole requirement this is the figure that should be entered on the system.

13. SMALL AND MEDIUM SIZED ENTERPRISES

- 13.1 The Authority is fully committed to supporting the Government's [small and medium-sized enterprise](#)¹ (SME) initiative; including the aspiration that 25% of central government spend goes to SME's by 2015. All Tenderers, as potential suppliers to the Authority, will also be expected to support this initiative both directly and through their supply chains.
- 13.2 The Authority, when appropriate, will ask for proposals as part of this ITT on how Tenderers are intending to support the SME initiative.
- 13.3 Tenderers must also be aware that as part of this initiative, the Authority will expect that any suppliers within the supply chain are paid promptly. For certain Contracts, the Authority reserves the right to validate that prompt payment is taking place.
- 13.4 Suppliers to the Authority are encouraged to make their own commitment on prompt payment by registering with the [Prompt Payment Code](#)².
- 13.5 The Authority participates in a mandatory pan-government reporting scheme quarterly on direct expenditure and indirect supply-chain expenditure with SME's. This is part of the Government's target to achieve 25% of spend with SME's by 2015. The successful tenderer will be expected to commit to the provision of supply-chain SME spend data to support this government priority at pre-defined reporting points.

14. TRANSPARENCY

- 14.1 In accordance with the Government's policy on transparency, Tenderers should be aware that the Authority intends to make the ITT and any subsequent Contract publicly available, by publishing it on the Government portal: [Contracts Finder](#)³.
- 14.2 The Tenderer gives permission for the Authority to publish the awarded Contract in its entirety, including from time to time any agreed changes to the Contract (i.e. Variation Orders), to the general public.
- 14.3 The Authority shall be responsible for determining in its absolute discretion whether any of the content of the Contract is exempt from disclosure, in accordance with the provisions of the FOIA or the EIR; also taking into account the Data Protection Act. If the tender is submitted as a PDF the awarded supplier will be requested to provide the tender in an editable format (such as Microsoft Word) in order to allow the Authority to redact any information deemed sensitive or confidential.

¹ http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/sme-definition/index_en.htm

² <http://www.promptpaymentcode.org.uk>

³ <http://www.businesslink.gov.uk/contractsfinder>

15. PUBLIC SECTOR EQUALITY DUTY (PSED)

- 15.1 The PSED is contained within section 149 of the Equality Act 2010. It requires public sector bodies to pay due regard to the three strands of the duty:
 - 15.1.1 Eliminate unlawful discrimination, harassment, victimisation and any other conduct prohibited by the Act;
 - 15.1.2 Advance equality of opportunity between people who share a protected characteristic and people who do not share it; and
 - 15.1.3 Foster good relations between people who share a protected characteristic and people who do not share it.
- 15.2 Contracts that have been identified as having significant equality-related risks may require the successful tenderer to provide specific management information annually to ensure the Authority meets its statutory obligations.

16. LANGUAGE

- 16.1 Tenders, all documents and all correspondence relating to the tender must be written in English.

SECTION TWO: Conditions of Contract

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Conditions of Contract are downloadable from BMS

SECTION THREE: Evaluation Methodology & Criteria

1. OVERVIEW

- 1.1. In the interests of an open, fair and transparent assessment, this document sets out how the Authority intends to evaluate tender responses. It outlines the evaluation criteria and respective weightings, as well as the evaluation methodology to be applied.
- 1.2. The evaluation will use a “sifting” approach to determine the Contract Award recipient with Tenderers having to pass through a series of “gates”. Tenders will be evaluated on a section-by-section basis (in order) with Tenderers that are unsuccessful in a section not proceeding to the next (with the subsequent sections of the tender not evaluated and the Supplier set aside).

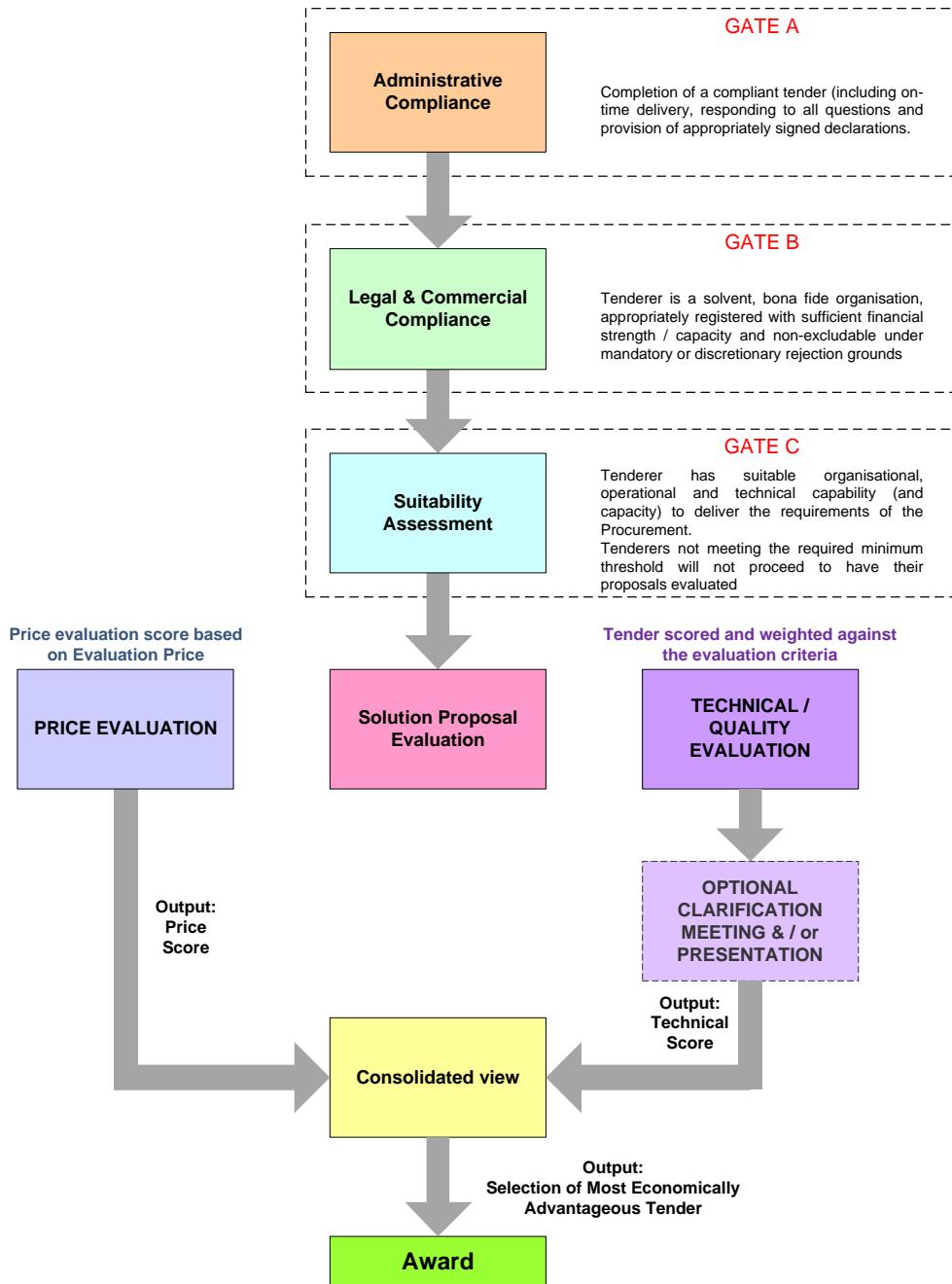
Comment [PD1]: Approach to be confirmed

2. EVALUATION PROCESS

- 2.1. The diagram below (Figure 1) summarises the process that will be used to select an appropriate Tenderer and award the contract for this procurement. It should be noted that pricing is only taken into consideration should the technical / quality evaluation result achieves the threshold (as stated in paragraph 7.4 below).

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Figure 1: Evaluation process overview



2.2. An Evaluation Panel consisting of suitably experienced members from [DN: Identify the DH Directorates] and members of DH Procurement Services will carry out the evaluation. DH Procurement Services will only act as moderator during the suitability and proposal assessment phases of the evaluation.

3. ADMINISTRATIVE COMPLIANCE (GATE A)

- 3.1. The Authority will check each tender for completeness and compliance with the tender instructions. The Authority reserves the right to reject any tenders it considers substantially incomplete, or non-compliant (each tender will be assessed on its own merit, according to the level/importance of omitted or non-compliant content).

4. **LEGAL & COMMERCIAL COMPLIANCE (GATE B)**

- 4.1. The legal and commercial compliance gate will be evaluated using Tenderer responses to Part B, Schedule One(a), Sections A and B.
- 4.2. (Question A.5) – The Tenderer will be excluded if it is neither registered nor licensed appropriately.
- 4.3. (Question A.6) – The Tenderer will be excluded should any of the grounds for mandatory rejection be triggered.
- 4.4. (Question A.7(a) to (g) and (i)) – The Tenderer will be excluded should any of the grounds for discretionary rejection be triggered.
- 4.5. (Question A.7(h)) – If the Tenderer responds “yes” to the tax compliance questions (i.e. declare that they have had an ‘occasion of non-compliance’) then the Authority may decide to exclude them on this basis. Any such decision is at the discretion of the Authority on the basis that the tax compliance provisions are discretionary exclusion criteria under the Regulations.
- 4.6. (Question A.8) – The response to this question is for information only.
- 4.7. (Question B.1) – The Tenderer will be excluded should it be assessed that it has a high risk of:
 - Insolvency over the lifetime of the contract;
 - Inability to cope with the contract size;
 - Insufficient financial capacity to deliver the services effectively.

Comment [PD2]: As per comment above

5. SUITABILITY ASSESSMENT (GATE C)

- 5.1. The Suitability Assessment will be carried out using Tenderer responses to Part B, Schedule One (a), Section C and uses a generic scoring schema (provided in [Table 2](#)[Table 2](#) below).
- 5.2. Each evaluation area is weighted to show the relative importance / significance of the criteria specific to the Suitability Assessment. [Table 3](#)[Table 3](#) provides details of the requirements and the relative weightings that the Authority will use in assessing Tenderer proposals. The organisational details are not assessed, other than for compliance against the requirements of the procurement.
- 5.3. The scored responses are generally assessed out of a maximum of three (3). The Evaluation Panel will be unable to give partial scores (for example 2.5) however, when aggregating scores the Suitability Assessment score will be rounded to two decimal places.
- 5.4. A score of zero (0) will constitute a failure to evidence suitability (against the requirement of the Procurement) and will automatically disqualify the Tenderer.
- 5.5. Those Tenderers that achieve a weighted score of **one point eight five (1.85)** (equivalent to **61.67%** of the maximum 100% available score), or above will be taken forward to the next stage and have proposals evaluated. Those tenders not achieving this threshold will be set aside.

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Table 2: Generic Suitability Assessment Scoring Scheme

GRADE LABEL	GRADE	DEFINITION OF GRADE
Unacceptable	0	The response has been omitted, or the Tenderer proposal evidences inadequate (or insufficient) capacity or capability to deliver the requirement(s)
Weak	1	The Tenderer has demonstrated merit, although there is weakness evident in its capacity or capability for the purposes of the Procurement.
Satisfactory	2	The Tenderer has evidenced a level of capacity and capability suitable for the purposes of the Procurement.
Good	3	The Tenderer has evidenced a significant level of capability and capacity for the purposes of the Procurement.

Table 3: Suitability Assessment Evaluation Matrix

EVALUATION AREA	EVALUATION INTENTION	EVALUATION QUESTION	EVALUATION CRITERIA	WEIGHT
C.1 Organisational capability (experience)	Evaluated in conjunction with question C.2. Seeks to identify those organisations that have relevant management experience and the suitable tools, processes and governance to deliver the requirement(s)	Please provide details of the experience that the Tenderer (as an organisation) has in the delivery of services similar to those required under this contract. This experience should be evidenced with the contract examples provided in response to question C.2. If the Tenderer is operating in a “management” capacity (e.g. as part / lead of a consortium), then this management integration capability should be evidenced along with the operational delivery activities.	The Tenderer's response is relevant to this procurement in terms of - Size - Complexity - Value	15%
C.2 Contract Examples	Used in conjunction with question C.1	Please provide details of up to three contracts from either, or both, the public and private sectors, that are relevant to the Authority's requirement(s). Contracts for the supply of goods or services should have been performed during the past three years.	N/a	N/a

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EVALUATION AREA	EVALUATION INTENTION	EVALUATION QUESTION	EVALUATION CRITERIA	WEIGHT
C.3 Operational capability (leadership / management)	Seeks to establish that the Tenderer's Project / Delivery Lead(s) have the appropriate skills, qualifications and experience for the scope of service delivery requirements	Please provide details of the qualifications and experience of the individual(s) whose responsibility will be to ensure that the requirement is delivered. (This may be a Partner, Project Manager, Lead Consultant or similar. If there is a specific Project / Delivery Lead for each (or a set of) specific deliverables, then the details for all Project / Delivery Leads should be provided.)	The Tenderer's response shows that it: - Has made Project / Delivery Lead arrangements that are sufficient and suitable - Has made Project / Delivery Lead arrangements with individual(s) that have the appropriate qualifications and experience to manage the scope of the requirements	50%
C.4 Technical capability (service delivery)	Seeks to establish that the Tenderer's key team personnel (i.e. those delivering the services) have the appropriate skills, qualifications and experience for a scope of service delivery requirements.	Please provide details of the key team members (highlighting the role each will undertake) in delivering the requirement(s). Tenderers must demonstrate that the personnel proposed have direct experience of being involved with similar requirements and that each member has the relevant skills and competencies to fulfil the specific roles identified.	The Tenderer's response shows that it - Has resources that have with appropriate skills - Has resources that have with appropriate experience and qualifications	25%
C.5 Staffing (knowledge base)	Seeks to establish that the Tenderer has the resources for contingency and a knowledge base against the service delivery requirement	Please detail the number of staff available to the Tenderer (including consortia members and named sub-contractors where appropriate) carrying out of services directly relevant to those required.	The Tenderer's response shows that it - Has a resource base capable of mitigating delivery risk - Has a pool of knowledge	10%

6. PROPOSAL ASSESSMENT

- 6.1. All previous scoring (such as for the Suitability Assessment) will be discarded at this point such that the Contract Award decision is based solely on the basis of the Tenderer proposal and price offering.
- 6.2. The Authority uses a quality / price ratio to determine the outcome of its evaluation where quality (technical evaluation) and price are weighted and scored individually before being combined.
- 6.3. Technical criteria are weighted and scored as a percentage of the maximum score available with a minimum quality threshold set.
- 6.4. Price is scored as a percentage from the deviation of a Tenderer's Evaluation Price from the mean (or average) Evaluation Price (see Section 8 – Price Evaluation)
- 6.5. A consolidation process between the quality and price scores is applied based on the weightings detailed in Section 10 (Consolidated View).

7. TECHNICAL EVALUATION

- 7.1. Tenders are assessed on how well they satisfy the technical evaluation criteria. The relative importance of each criterion is established by giving it a percentage weighting so that all the weightings equal 100%. The Evaluation Matrix ([Table 5](#)[Table 5](#)) provides details of the weightings that the Authority will use in assessing Tenderer proposals.
- 7.2. The Technical Evaluation will be carried out using Tenderer responses to Part B, Schedule One (a), Section D, using the scoring scheme (identified in [Table 4](#)[Table 4](#) below).
- 7.3. The scored responses are generally assessed out of a maximum of **four (4)**. The Evaluation Panel will not be allowed to give partial scores (for example 3.5); however, once all scores are aggregated, the technical scores will be rounded to two decimal places prior to consolidating with the price evaluation.
- 7.4. The Authority has set a minimum quality threshold for this procurement, therefore, those Tenderers that achieve a weighted score of **one point nine (1.90)** (equivalent to **47.5%** of the 100% available maximum score) or above, will be eligible for consideration of Contract Award by evaluation of the Tenderer pricing proposals. Those tenders not achieving this threshold will be set aside and will not be considered further.

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(Part A – Instructions)

Table 4: Generic Technical Evaluation Scoring Scheme

GRADE LABEL	GRADE	DEFINITION OF GRADE
Unacceptable	0	The response has been omitted, or the Tenderer proposal evidences inadequate (or insufficient) delivery of the requirement
Weak	1	The Tenderer proposal has merit, although there is weakness (or inconsistency) as to the full satisfaction of the delivery requirement
Satisfactory	2	The Tenderer proposal has a suitable level of detail to assure that a satisfactory delivery of the service requirement is likely.
Good	3	The Tenderer proposal has evidenced a level of understanding that assures there will be desirable value-add within the solution or superior and desirable (time or quality) delivery outcomes.
Excellent	4	The Tenderer proposal evidences significant levels of understanding and offers an innovative solution that includes desirable value-add to the Authority.

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Table 5: Technical Evaluation Matrix

EVALUATION AREA	EVALUATION INTENTION	EVALUATION QUESTION	EVALUATION CRITERIA	WEIGHT
D.1 Overview	This response is not evaluated and is used to contextualise the Tenderer's response.)	<p>Tenderers must provide a concise summary highlighting the key aspects of the proposal.</p> <p>This should include a brief overview of how the tenderer will support the Authority in meeting Government policy targets around SME's, sustainability and skills development.</p>	<p>Overview to include:</p> <ul style="list-style-type: none"> - Where relevant, tenderer can provide data outputs to support Government reporting initiatives on SME expenditure and sustainability outcome reporting. - The tenderer has an ethical approach to supply chain management that supports outcomes such as prompt payment - Where relevant, will utilise equipment compliant with the Energy Efficiency Directive (EED6) to deliver the service - The tenderer can evidence a commitment to support the development of skills and apprenticeships through service delivery 	N/a
D.2 Method Statement	Seeks to establish that the Tenderer has understood the requirements and has a credible plan for delivering successful outcomes	Tenderers must provide a method statement detailing how it is proposed to fulfil the Authority's requirements (as described in the Specification). This should include a description of how it is intended to obtain, deliver and sustain the services for all aspects of the requirement.	<p>The Tenderer's response shows that it:</p> <ul style="list-style-type: none"> - Has a credible solution - Has a defined and achievable timeline - Has identified and proposes suitable management of the delivery risks - Has a quality assurance regime that monitors, measures and assures quality outcomes 	15%

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EVALUATION AREA	EVALUATION INTENTION	EVALUATION QUESTION	EVALUATION CRITERIA	WEIGHT
D.3 Project Delivery Management	Seeks to establish that the Tenderer has the necessary management and project delivery methods and resources to successfully deliver the Specification	<p>The Tenderer must outline the processes and resources it proposes to use in order to fulfil the Authority's requirements:</p> <p>Tenderers should demonstrate how it will</p> <ul style="list-style-type: none"> i) Comply with the timetable; ii) Manage risks appropriately (including delivery to budget); & iii) Adhere to the required quality standards. 	<p>The Tenderer's response shows that it</p> <ul style="list-style-type: none"> - Has provided sufficient resource to deliver the Method Statement proposals - Has assigned suitably qualified and experienced resource for service delivery - Has identified appropriate management of these resources - Has a resource plan that integrates with the method statement(s) - Manages risk appropriately 	55%
D.4 Contract Transfer and Exit Strategy	Seeks to ensure that the Tenderer will transfer knowledge back into the Authority and exit the contract in such a way as to facilitate re-procurement and/or project termination	Tenderers must indicate its plans for the transfer of knowledge and skills from this activity back to the Authority during and at the end of the contract.	The Tenderer knowledge transfer arrangements and exit strategy is credible and can achieve the required outputs	20%
D.5 Authority responsibilities	Seeks to ensure that the Tenderer is not seeking to transfer unreasonable, material, additional costs or increased risk back to the Authority	Tenderers must identify any areas of Authority responsibility NOT already detailed within the Specification.	The Tenderer response does not impose additional material and adverse risk, responsibility or cost onto the Authority.	10%

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8. PRICE EVALUATION

- 8.1. The price evaluation is carried out using the Evaluation Price (EP) for each Tenderer proposal. The Evaluation Price is the method by which Tenderer proposals are assessed on a like-for-like basis.
- 8.2. EP is calculated as follows:
 - Whole of life cost
- 8.3. To be eligible for consideration under the Price Evaluation assessment, the EP for a Tenderer (xxxx) [DN: complete the affordability parameters here. For example "must not exceed £xxx"]
- 8.4. Once the EP is calculated, the following steps are taken:
 1. The average (i.e. the mean) EP across the Tenderers that have achieved the required technical/quality threshold identified in paragraph 7.4 above is calculated;
 2. The percentage difference between the Tenderer EP and the average EP is calculated;
 3. The average EP is assigned an equivalent value of 50-points as a starting point for each Tenderer;
 4. One point is deducted for each percentage point that a Tenderer EP is above the average EP; or
 5. One point is added for each percentage point that a Tenderer EP is below the average EP.
- 8.5. In the event that the aggregate point score for a Tenderer is negative, then the Tenderer score is restricted to 0 points. If however, the points score for a Tenderer is greater than 100 points then the price evaluation score for the Tenderer will be limited to a maximum of 100 points.
- 8.6. This aggregated point value is rounded to two decimal places, then carried forward and used during the consolidation exercise.
- 8.7. The example below illustrates the process:

[DN: This will need to change if using Median or other price method]

Table 6: Step 1 of the price evaluation

ELIGIBLE BIDDER	EVALUATION PRICE (EP)	DIFFERENCE FROM EP _{Avg} (DIF)
BIDDER A	£ 1,000.00	-£ 66.67
BIDDER B	£ 900.00	-£ 166.67
BIDDER C	£ 1,300.00	+£ 233.33
MEAN EVALUATION PRICE (EP _{Avg})	£ 1066.67	

Table 7: Steps 2 to 5 of the price evaluation

ELIGIBLE BIDDER	PERCENTAGE CHANGE = (DIF ÷ EP _{Avg}) × 100	PRICE SCORE = 50 ± (PC)

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ELIGIBLE BIDDER	PERCENTAGE CHANGE $= (\text{DIF} \div \text{EP}_{\text{AVG}}) \times 100$	PRICE SCORE $= 50 \pm (\text{PC})$
BIDDER A	- 6.250	56.20
BIDDER B	- 15.625	65.63
BIDDER C	+ 21.875	28.13

8.8. The Price Score (as identified in [Table 7](#)) is taken forward and consolidated with the Technical Evaluation.

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9. TENDERER CLARIFICATION MEETING

- 9.1. Following the assessment of the tender proposals, the Authority (at its sole discretion) may invite Tenderers to a clarification meeting. If required this will take place between receipt of tenders and announcement of successful tender. It is anticipated that Tenderers will be provided with at least two (2) days notice if a meeting is to be required.
- 9.2. If the Authority decides to hold a clarification meeting the number of Tenderers to be invited will be determined by the Authority in its sole discretion.
- 9.3. Tenderers will be invited to give a presentation on their proposals. Key personnel in the delivery should attend and be involved in all aspects of the meeting.
- 9.4. The purpose of the meeting is to gain a greater understanding of a proposals and will generally take the form of a short presentation (by the Tenderer) followed by a question and answer session.
- 9.5. Tenderers can either accept or decline a request for such a meeting. However, it is in the interests of the Tenderer to attend and provide additional confidence in its proposals to the Authority.
- 9.6. Although not scored on a separate basis, the session will be used to confirm the technical / quality score assessments of the tender evaluation. As such, scores achieved during the written tender evaluation may be adjusted (up or down) and the consolidated score of a Tenderer amended.
- 9.7. The Authority has set aside the following dates for accommodating potential clarification meetings:

[Authority contingency dates (and times) for clarification meetings]

10. CONSOLIDATED VIEW

- 10.1. Tenders will be evaluated on both technical criteria and price. To ensure the relative importance of both categories are reflected correctly in the overall score, a weighting system has been applied to each part.
- 10.2. The Technical Evaluation forms **[70%]**, whilst the Price Evaluation **[30%]**, of the final score.
- 10.3. As an example, using a technical score of 60% of the available maximum technical evaluation score and a price score of 50 (which is equivalent to an Evaluation Price equalling the mean Evaluation Price i.e. $\text{EP} = \text{EP}_{\text{AVG}}$) would equate to the following:

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Table 8: Consolidation Calculation

EVALUATION AREA	CALCULATION
Technical score (As percentage of maximum)	$60 \times 70\% = 42$
Price score (As percentage difference from mean)	$50 \times 30\% = 15$
Consolidated Score	= 57

10.4. The successful Tenderer will be that which fulfils the following criteria:

- (i) Has an Evaluation Price that is less than or equal to £xxx (DN: See 8.3 above, this may not be required);
- (ii) Has a Technical Score that is greater or equal to (see paragraph 7.4 above); and
- (iii) Has the highest combined score across those Tenderers that satisfy the criteria in (i) & (ii) above.

11. CONTRACT AWARD

11.1. The Contract will be awarded based on the offer that is the most economically advantageous to the Authority. For the purposes of this procurement, this is defined as the highest consolidated score (achieved in the manner described above).